



MANUAL for the SECRETARY of an ELKS LODGE



**BENEVOLENT AND PROTECTIVE ORDER OF ELKS
UNITED STATES OF AMERICA**

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GRAND LODGE
Benevolent and Protective
ORDER OF ELKS
UNITED STATES OF AMERICA

FOREWORD

To administer the affairs affecting the welfare of our Order, the country is divided into approximately 250 districts where the Grand Exalted Ruler, the National President of the Order, is represented by an officially appointed District Deputy Grand Exalted Ruler. The District Deputy is the liaison between the Lodges of the district and the Grand Lodge. His or her responsibility is not only to protect the interests of the Grand Lodge but to give advice to the Lodges of the district. If problems arise, the Exalted Ruler and Lodge Secretary must first consult the District Deputy. Further assistance may come from the Past Grand Exalted Ruler(s) assigned to supervise Grand Lodge matters in the area. If the District Deputy cannot supply needed information, together with the Secretary, they may seek the more experienced advice of the Past Grand Exalted Ruler(s).

However, our Lodges are not expected to carry on their duties unassisted. Every significant program of the Order is administered by a parallel Grand Lodge Committee, each consisting of 8 dedicated and helpful Committee Members who work with the Lodges, Districts and States in their assigned Grand Lodge Areas. Find your Grand Lodge Area in the listing below and consult frequently the appropriate Committee Members found in the annually distributed Grand Lodge and State Associations Directory to ensure success in your Lodge efforts.

The Secretary is one of the most important Officers of the Subordinate Lodge. This administrative officer must work harmoniously with the Exalted Ruler, the executive head of the Lodge. The success of the Lodge demands this.

A Secretary must be a dedicated Elk deeply interested in our Order and the Lodge, be experienced with office work and have computer skills. He or she is detail-oriented and especially familiar with the Laws and procedures of our Order. New Secretaries should study this

Manual, the Manual for Exalted Rulers, Officers and Committeemen, the Statutes Annotated and the Auditing & Accounting Manual. They should read the annual Grand Lodge Proceedings and the Annual Reports made by the Grand Lodge Officers, Commissions and Committees, and all issues of *The Elks Magazine*. In addition, Lodge Secretaries should become acclimated with the Chicago Lodge Membership System/Secretary Web site at <http://www.Elks.Org/ChicagoLMS/>. They must have time to do the job of Secretary. The duties are constant throughout the Lodge year and require prompt and almost daily attention. A good Secretary cannot procrastinate.

Because certain publications are essential to every Secretary's duties, as soon as they are updated each year, every Lodge will be sent at no charge the Subordinate Lodge Directory [Code 553700], the Grand Lodge & State Associations Directory [Code 553800], the Statutes Annotated [Code 520100], and the Grand Lodge (*annual convention*) Proceedings [Code 511400]. While you must retain control of these Lodge-owned items for reference, let your Officers and Members know that they can order additional personal copies through you to facilitate their own knowledge and duties. Also, if any Manual written specifically for the Lodge Committees undergoes a major revision, a free copy is automatically sent so that your Lodge Committee will benefit from the Order's latest procedures and suggestions.

We realize that no one publication can answer all the questions or solve all the problems that confront a Secretary. Revisions will necessarily be made in the Manual from time to time, and you can help if you send to the Grand Secretary any comments or suggestions you may have for improving future editions.

Signed,
GRAND SECRETARY

GRAND LODGE AREAS (*as of May 2008*)

Area 1: Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont

Area 2: Delaware, District of Columbia, Maryland, New Jersey, Pennsylvania

Area 3: Alabama, Florida, Georgia, Mississippi, North Carolina, Panama, Puerto Rico, South Carolina, Tennessee, Virginia

Area 4: Indiana, Kentucky, Michigan, Ohio, West Virginia

Area 5: Illinois, Iowa, Minnesota, Missouri, Wisconsin

Area 6: Arkansas, Colorado, Kansas, Louisiana, Nebraska, New Mexico, Oklahoma, Texas

Area 7: Arizona, California, Guam, Hawaii, Nevada, Philippines, Utah

Area 8: Alaska, Idaho, Montana, North Dakota, Oregon, South Dakota, Washington, Wyoming

MOST IMPORTANT

**Notify the Grand Secretary immediately when any change is made
in the office of Exalted Ruler or Lodge Secretary.**

SECRETARY'S DUTIES

(see Appendix — Exhibit A)

*YEAR-ROUND DUTIES

Keep correct minutes of all sessions.

Keep correct accounts between the Lodge and its Members.

Assign to each New Member a number and create a record file.

Maintain bulletin board notices and posters.

Keep correct mailing list of the Members, both in the Secretary's office and in the file of the Circulation Department of *The Elks Magazine*.

Receive all monies due the Lodge, from any source whatever, paying same to the Treasurer at the earliest practicable moment and obtaining receipt.

Receive all dues from Members, paying same to the Treasurer at the earliest practicable moment, and issue Membership Cards and, if Lodge desires, identification cards.

Assist Lodge Auditor and Committee in preparation of Annual Lodge Audit Report to Grand Lodge, as well as two Membership Reports for Lodge.

Arrange for ordering and receiving of supplies from Grand Secretary in cooperation with Lodge Trustees.

Attend to all correspondence subject to the approval of the Exalted Ruler.

Promptly handle document/record transfers with other Lodges for transferred/reinstated Members.

Apply for contests and awards available to deserving Members.

Notify appropriate Lodge personnel of required license renewals, government reports and property inspections.

Supervise entry year-round of charitable/community service statistics into Charity Records Book or directly into CLMS upon completion by Committees involved.

Inform persons elected to membership of such fact, and notify rejected applicants.

Attend District and State Association Meetings.

Notify the Members of all Committees of their appointments, together with the subject given into their charge, and provide them with appropriate manuals.

Supply Lapsation Committee with monthly Delinquent List.

Report to the Grand Secretary each expulsion or suspension (*do not include those dropped from the rolls for nonpayment of dues, or House Committee suspensions*).

Report immediately to the Grand Secretary's office any changes in Exalted Ruler's and/or Secretary's names, addresses, phone numbers or email addresses.

Serve as a Member of the Standing Relief Committee.

Perform all duties required in connection with Subordinate Forums.

Any additional duties approved by the Lodge.

CHRONOLOGY OF DUTIES

April:

Prepare Annual Report and send same to Grand Secretary along with Grand Lodge dues as soon as possible after April 1. (Sec. 12.050, Stats.) MAY 1 DEADLINE

Report on year's activities to the Lodge.
(Sec. 12.050, Stats.)

Notify the Members of all Committees of their appointments, together with the subject given into their charge.
(Sec. 12.050, Stats.)

Attend District Deputy Clinic.

*Continue Year-Round Duties.

May:

*Continue Year-Round Duties.

June:

Forward Annual Audit Report to Grand Lodge by JUNE 30th.

Prepare Forum Box with the aid of Trustees.

(Sec. 1.210, Stats.)

*Continue Year-Round Duties.

July:

*Continue Year-Round Duties.

August:

Attend District Deputy Clinic.

*Continue Year-Round Duties.

September:

Prepare all records for District Deputy Official Lodge Visit.

Order Membership Cards on Grand Secretary-supplied form.

Verify Lodge vote on Constitutional Amendments (*if any*) on Grand Secretary-supplied form.

*Continue Year-Round Duties.

October:

Report on half year's activities of your office to the Lodge.

(Sec. 12.050, Stats.)

*Continue Year-Round Duties.

November:

Prepare Periodic Membership Report. (Sec. 12.050, Stats.)

*Continue Year-Round Duties.

December:

Prepare Forum Box with the aid of Trustees.

(Sec. 1.210, Stats.)

*Continue Year-Round Duties.

January:

Attend District Deputy Clinic.

Remind Auditing Committee to arrange for Annual Audit.

*Continue Year-Round Duties.

February:

Prepare Directory Information Forms Packet supplied by Grand Secretary.

Provide ballots for election (*if needed*).

*Continue Year-Round Duties.

March:

Begin preparing for cut-off of fiscal year in all accounts and records at month's end.

*Continue Year-Round Duties.

NATIONAL OFFICES — CHICAGO

For when you need to contact us, following are the various Grand Lodge Offices in Chicago: **All mail:**— (name of person/agency), BPO Elks, 2750 N. Lakeview Avenue, Chicago, IL 60614-1889.

<u>OFFICE/AGENCY</u>	<u>PHONE</u>	<u>FAX</u>	<u>E-MAIL</u>
Grand Secretary	773-755-4708	773-755-4790	grandlodge@elks.org
Supplies/Shipping	773-755-4710	773-755-4711	shipping@elks.org
Central Accounting	773-755-4712	773-755-4713	acctg@elks.org
Insurance	773-755-4714	773-755-4715	insurance@elks.org
Veterans Service	773-755-4736	773-755-4737	vets@elks.org
Internet	773-755-4724	773-755-4725	webmaster@elks.org
Convention/Meetings	773-755-4722	773-755-4723	conv@elks.org
Foundation/Pledges	773-755-4730	773-755-4733	pledges@elks.org
Foundation/Scholarships	773-755-4732	773-755-4733	scholarship@elks.org
Magazine/Articles	773-755-4740	773-755-4792	magnews@elks.org
Magazine/Circulation	773-755-4742	773-755-4743	magcirc@elks.org
Label Orders	773-755-4744	773-755-4745	magcirc@elks.org

* * * AUTOMATED DIRECTORY SERVICE — 773-755-4704 * * *

MEMORIAL BUILDING HOURS/TOURS INFORMATION — 773-755-4876

OFFICE AND FILES

While the Laws of our Order do not explicitly require every Lodge to designate an office for the Lodge Secretary, they do so implicitly by mandating that he or she maintain secure custody of funds and records. Within limits of space and Lodge funds, this office can be as simple or extensive as needed. But several points must be accepted if the Lodge provides such an office. Security is essential for either the entire office or cabinets, files, safe and desk, which should be locked with only the Secretary having the key. A Secretary could not reasonably assume an obligation and be bonded (*see following NOTE*), as our Statutes require, to maintain correct records and accounts, if those records could be easily altered, destroyed or removed without the Secretary's knowledge or consent. Likewise, entrusting records to the Secretary obligates the Lodge to provide sufficient storage to hold them yet allow easy access and reference. Compelling any Secretary to maintain Lodge records off Lodge premises when the Lodge is able to do otherwise is negligence that could ultimately be detrimental to the Lodge.

Our Statutes contain provisions for such clerical assistance as the volume of the Secretary's duties may require. But the final responsibility for maintaining accurate, complete and up-to-date records and accounts can never be delegated away from the Secretary. Because our Statutes stipulate that Lodge records shall be open to inspection by all Lodge Members, regular office hours should be maintained.

While the Statutes do not require that the Lodge maintain a Post Office Box, experience has shown that this practice provides continuity of mail delivery to responsible individuals within the Lodge despite the absence or change in Officers. If the Lodge is not staffed by responsible personnel during daytime hours Monday through Friday to accept deliveries, the Secretary should arrange for an alternate location to

handle this duty, after discussion with the Exalted Ruler and Trustees. This shipping address should then be given on all orders for supplies from the Grand Secretary or elsewhere to prevent lost merchandise. A good practice to prevent order duplication or unauthorized purchases is to impress the Lodge seal on all outgoing orders. As custodian of this seal, the Secretary then can coordinate supplies.

NOTE: The coverage provided to all Lodges in the Grand Lodge Insurance Program includes automatic **bonding** of both the Lodge Secretary and Lodge Treasurer annually for \$50,000. Be sure your Lodge isn't paying for additional duplicate coverage.

CHICAGO LODGE MEMBERSHIP SYSTEM

The Chicago Lodge Membership System (CLMS) is the official membership record keeping and reporting system for the Elks. The computerized system is mandatory for all Lodges. The program is available through the Grand Lodge Web site at: <http://www.Elks.Org/ChicagoLMS/>. (*Also see Section II, Page 17.*)

It is the duty of the Secretary to maintain the Lodge membership tracking and reporting records by use of the CLMS program. Membership information entered into the CLMS program must be backed up at the Lodge level as well as the Grand Lodge "offsite" location every time membership information is entered into the CLMS program.

Computer and Internet requirements can be found on the CLMS Web site. The CLMS operating manual is available for printing from the CLMS home page. For a fee the Lodge Secretary can order the CLMS Manual from the Elks Shipping Department.

In addition to membership recording and tracking, CLMS offers dues billing statements, labels, and envelope options.

SUPPLIES ORDERED FROM GRAND SECRETARY

Discussed elsewhere in this manual are items NOT available from the Shipping Department of the Grand Secretary (*ENF forms and materials, Drug Awareness literature, membership card stickers, Lodge mailing labels, goods marketed by Elks-licensed vendors*). This section deals with those items the Grand Secretary DOES supply, most of which are forms and paraphernalia required by our Laws to be used in all Lodges.

All printed items supplied by the Grand Secretary carry a six-digit reorder Code Number for identifying those items. We also supply up-to-date price lists. (*Manuals listed show dates of latest revisions*). Order forms are available free upon request. However, the Grand Secretary can only accept merchandise orders from those authorized by the Lodge (*Exalted Ruler, Secretary, Trustee or other Lodge-designated person*). Page Three lists the information needed to place orders by mail, e-mail, phone, fax or online.

Orders for in-stock items are normally shipped within 2-3 days. Back-orders will ship as soon as the material is available. Some items require customized printing, embroidering or engraving, and will take 3-12 weeks or longer to ship, depending on the item. Please consult the price list or call for details on custom orders.

When ordering supplies from the Elks National Headquarters in Chicago, specify whether to ship via the Post Office, UPS or FED EX Ground. If no preference is given, your order will be shipped UPS or FED EX Ground, as both services provide tracking numbers and insurance. "Next Day Air" and "Second Day Air" service is available upon request and for an extra charge.

An invoice for each order will be sent separately via first class mail, approximately 3 days after the merchandise is shipped. Invoices are always sent to the mailing address of the Lodge in care of the Lodge Secretary unless otherwise requested.

UPS and FED EX Ground require a street address for shipment, preferably with someone at that address able to receive and sign for the package. However, if the location is safe from loss and the elements, e.g., an enclosed porch or hall, the driver may leave the package unsigned for. When placing your order for delivery to a street address, specify if this address is residential or commercial (Lodge/business).

SECRETARY'S RESOURCE AT ELKS.ORG — GRAND LODGE WEB SITE

The Grand Lodge Web site features a comprehensive resource center for local Lodge Secretaries: <http://www.Elks.Org/ChicagoLMS/>. (*Also see Section II, Page 27.*) Secretaries can also order Lodge supplies and membership cards, and electronically submit the Grand Lodge-mandated annual and semi-annual membership reports. Secretaries also have access to a private, secretaries-only message board where they can discuss the trials and tribulations of the office and get quick answers to administrative questions.

The Resource Center also allows Secretaries to maintain their Lodge "Virtual Home Page," or VHP. This easy-to-use "Web site construction kit" allows Lodges to post important news, dates, pictures and more without any special technical expertise or software. Those Secretaries who choose not to maintain their VHP personally can electronically appoint a "Cyber-Assistant" to maintain the site. (*See Section II, Page 26.*)

To access the Secretary Resource Center, simply sign on at <http://www.Elks.Org/ChicagoLMS/> with your regular Elks.org user name and password. (*If the system doesn't recognize you as Secretary, contact the Office of the Grand Secretary at grandlodge@elks.org to make sure you're listed as Secretary in the Grand Lodge database.*)

If you don't yet have a Elks.Org password, you can register online at: <http://www.Elks.Org/members/registration.cfm>

The Secretary's Resource Center at Elks.Org is your resource. Please join us online and see how hundreds of other Secretaries are using the Internet to improve the way they do business.

GRAND LODGE PUBLICATIONS THAT SHOULD BE IN SECRETARY'S OFFICE

* Accident Prevention Manual — Code 513100

* Americanism Program Manual — Code 512000

Annotated Statutes (latest issue) — Code 520100

* Auditing, Accounting and Management Manual
— Code 510100

Directory of Subordinate Lodges (latest issue)
— Code 553700

Discrimination and Harassment Guide — Code 510900

* Drug Awareness Manual — (*April 2005—CD/online:
<http://elks.org/GrandLodge/dap/dap125.pdf>)

* ENF Chairperson Handbook & Training Manual —
(*Annual—CD/online: <http://elks.org/enf/volunteers.-cfm?menu=download>)

* Elks National Veterans Service Manual — Code 513500

* ERs, Officers and Committee Members Manual
— Code 510500

* Government Relations Manual — Code 511000

* Grand Lodge Newsletter Issues

Grand Lodge Officers, Committeemen & State Associations
Directory (latest issue) — Code 553800

Grand Lodge Proceedings — Code 511400

* Grand Lodge Program Book (latest issue)
— Code 514000

Judiciary-approved Lodge By-Laws (latest issue) — Code
520501

History of the Order — Code 511300

* Investigating Committee Manual — Code 510200

Leadership Training Booklets (set of 5) — Code 511900

Liability Insurance Program Guide — Code 513000

* Lodge Activities Manual — Code 510300

* Lodge Auditing Committee Manual — Code 510000

* Media Relations Handbook — Code 510700

* Membership Manual — Code 510400

Price List of supplies, publications, paraphernalia, and forms available from the Office of the Grand Secretary.

* Protocol Manual — Code 510600

* Regular Ritual Pocket Book — Code 511500

* Rituals of Special Services — Code 511601

* Ritualistic Contest Manual — Code 519900

Robert's Rules of Order — Code 511700

* Secretary's Manual — Code 510800

* Youth Activities Program Manual — Code 512100

* Youth Supervision Guide — Code 512200

** Posted online at Elks.Org*

If you do not have a complete reference library of the above, order needed items through the Headquarters' Shipping Department. Additional publications, paraphernalia, forms and miscellaneous supplies appear in the Master Price List issued by the Chicago Headquarters. Additional order forms should be requested when needed.

ANNUAL DISTRICT DEPUTY VISIT

Each fall, the appointed District Deputies must visit their respective Lodges and report on Lodge adherence to the Laws and procedures of the Order, as well as its promotion of Elksdom's programs. We won't list the questions or items the District Deputy will wish to address. He or she will have informed you at the August clinic so that you can prepare. (*Appendix—Exhibit C*).

Note that the most recent Lodge backup of CLMS data should be performed no more than two weeks before the scheduled District Deputy visit.

If a Lodge Secretary has performed all the required duties covered in this manual, there is no cause for alarm. If any areas need adjustment, the purpose of this yearly visit by the District Deputy is to assist you and the Lodge, not to chastise. After the visit, the Lodge will receive the submitted report and a letter from the Grand Exalted Ruler, indicating any deficiencies. And, as stated elsewhere, your District Deputy is available year-round with valuable insights gained from his or her experience with many Lodges.

BOOKKEEPING

The Grand Lodge has published an Auditing, Accounting and Management Manual [Code 510100] to guide Subordinate Lodges in setting up and maintaining its books. This Manual contains forms and systems to record and plan your financial transactions so that all Lodges will follow essentially the same basic formats and accepted accounting procedures.

Each Lodge will have to obtain locally, with the advice of their accountant, items such as journal and ledger books. But the office of Grand Secretary does supply certain basic records, such as the Secretary's Cash Book [Code 553000], Treasurer's Cash Book [Code 553100], Secretary's Receipt Book [Code 552900] and Treasurer's Receipt Book [Code 553200].

The voucher system is the basic mechanism for financial disbursements of a Lodge through its designated Officers. It provides a physical reference document for future review. The varying needs within our Lodges would almost mandate a custom-designed form in each situation. As a result, Grand Lodge does not supply such a form beyond a basic "suggested" format in the Auditing, Accounting and Management Manual. If your Lodge does not have a voucher system, you and the Treasurer, Trustees, House Committee and Lodge accountant should design and adopt a form for the fiscal welfare of the Lodge.

The Secretary's Cash Book and Treasurer's Cash Book (*Appendix—Exhibit K*) are books of original entry. The Secretary's Cash Book is for recording receipts from Members and other sources. Numerous columns are provided for the Secretary to devise his or her own headings. Columns are also provided to record payments to the Treasurer.

In the Treasurer's Cash Book, the receipts from the Secretary, as well as all expenditures, can be recorded. These simple forms have been devised by Grand Lodge with the realization that many Secretaries are part-time and not professional bookkeepers. The forms may not be sufficient for a large operation but in the average Lodge with the addition of a general journal and a general ledger, these records should be sufficient for keeping the financial records. In some instances, hiring a public accountant may be advisable to set up a bookkeeping system to guide the Secretary and Treasurer.

While most Lodge transactions follow the same procedures as those of small businesses, many aspects are peculiar to our fraternal structure. In response, most State Associations maintain a Business Practices Committee that is available for guidance, either by telephone or on-site. The Grand Lodge Auditing & Accounting Committee, to which your Lodge sends its annual audit, is available for advice year-round. (*See listing on P. 9 – G/L Directory*). You and your Lodge will only have yourself to blame for an inadequate record system when so much help is just a telephone call away.

In all Lodge records mandated by our Statutes, the Uniform Chart of Accounts numbering system (*as shown in Auditing & Accounting Manual*) must be used to facilitate the Lodge's periodic financial review. The system permits the Grand Lodge Auditing and Accounting Committee to evaluate quickly and accurately each Lodge's Annual Audit and to help Business Practices advisers analyze the conditions and practices and make recommendations to Lodges that request guidance. This Account Numbering should be used year-round, along with the Manual supplied to the accountant hired to prepare the Annual Audit.

ELKS NATIONAL FOUNDATION

Every Lodge has an Elks National Foundation Chairperson, who is appointed by the Exalted Ruler. This individual's responsibility is to promote the ENF's mission to help Elks build stronger communities; solicit donations from Lodge Members; provide donors with accurate giving information; and serve as liaison to the Foundation.

Many Lodge Secretaries, however, will assist with submitting donations to the ENF. Your Lodge ENF Chairperson has received a disk with instructions on how to submit donations. Training material may be downloaded at www.elks.org/enf. The Foundation also recommends working with your Lodge Chairperson to become familiar with the remittance process.

To request a remittance template online, visit: www.elks.org/enf/chairmen/forms.cfm. To request online additional supplies, such as donor cards, membership card stickers or brochures, visit: www.elks.org/enf/SupplyOrders.cfm. For information, contact the Foundation by phone at: (773) 755-4728, by email at: enf@elks.org or by mail at:

ELKS NATIONAL FOUNDATION
2750 N. Lakeview Avenue
Chicago, Illinois 60614-2256

DRUG AWARENESS PROGRAM SUPPLIES

Your Lodge will have a Drug Awareness Program Committee devoted to making the youth of your community healthy, productive and free of substance abuse. On occasion, you may have to help by ordering drug awareness literature for your Lodge. These materials must be ordered through the Chairman of your State Association's Drug Awareness Program. We ask you to keep the Chairman's name, address and telephone number handy for your Lodge Committee's use. For information on the Drug Awareness Program or to find the name of your State DAP Chairman, visit: www.Elks.Org/drugs/default.cfm.

STATE AND FEDERAL TAXES

Our Order and Subordinate Lodges are exempt from federal income tax under Section 501(c)(8) of the Internal Revenue Code. This exemption is also enjoyed by similar organizations. However, since the exemption of a Subordinate Lodge can be revoked for cause, even retroactively, every Lodge should be meticulous to avoid actions that might cause the loss of this privilege. All Secretaries should make sure that Lodge records are well-kept and that all reports that may be required of exempt organizations by the Internal Revenue Service and other government agencies, are filed promptly, accurately and completely. The IRS has stated no objection to fraternal organizations or clubs promoting greater use of their facilities by Members and their bona fide guests, but there is serious objection to soliciting public business.

A pertinent IRS ruling in connection with this matter states:

"A club which engages in business, such as making its social and recreational facilities

available to the general public ...is not organized and operated exclusively for pleasure, recreation, and other non-profitable purposes, and is not exempt under section 501(a) of the Internal Revenue Code. Solicitation by advertisement or otherwise for public patronage of its facilities is prima facie evidence that the club is engaging in business and is not being operated exclusively for pleasure, recreation or social purposes."

Our Order and Lodges, as employers, are liable for **(a)** withholding income tax from wages of employees; **(b)** taxes under the Federal Contributions Act (for social security); and **(c)** the tax under the Federal Unemployment Tax Act (for unemployment insurance). This applies to salaries paid to Lodge Secretaries and other specified Officers.

The Tax Reform Act of 1969 provides that Informational Tax Returns must be filed by all tax-exempt organizations. Failure to file such returns will result in a maximum \$5,000 penalty per year and/or loss of tax exempt status. Contact your nearest IRS office in this regard.

Every Lodge Secretary should become familiar with the above tax laws by obtaining from the IRS and other sources all available literature. The Secretary should also be familiar with the income and withholding tax (if any) as well as the unemployment tax provisions in the Lodge's state.

MINUTES

The Secretary is required to keep minutes of each Lodge meeting. Great care should be taken to see that this record is accurate and complete. Writing your minutes during the Lodge meeting should be avoided. Notes should be made in the meeting and minutes written afterwards. See that any notes you take are comprehensive enough to write minutes intelligently after the meeting. Taping each meeting is permitted, but not for permanent record. The recording should be erased after writing the minutes.

Make certain you record the applications received, applicants elected or rejected, applicants initiated, reinstated or affiliated as well as those Members who are ill or have died since the last meeting. Care should also be taken to see that motions are accurately recorded. Well-kept minutes can prove valuable when the information is needed. Of course, your minutes definitely **MUST INCLUDE** any action required by Statute or Grand Lodge, should confirmation of compliance be required later.

Lodge Secretaries may use any type of Minutes Book that fulfills Lodge needs. But templates for compiling Minutes are available online at <http://www.Elks.Org/ChicagoLMS/>.

As Lodge Secretary you not only take minutes of meetings but also read them at the next meeting. A Lodge is only as strong as the interest demonstrated by its Members. Knowledge of the Lodge's condition is vital to the Members' continued interest. When reading the previous meeting's minutes, it is always better to give too much information than to short-change those Members who want to take part and improve the Lodge. These are the same Members who can be depended upon when needed on short notice.

Special attention should be given to “Receipts of the Session” and “Bills Against The Lodge,” with dollar amounts and all pertinent details read for each entry, rather than just “\$473.29 received” or “we owe \$581.” When motions are for voting at a subsequent meeting, restate the motion for those Members who may have forgotten or who weren’t present previously. Once you have recorded minutes and read them at the next meeting, more than likely you need not be concerned further. However, whenever a question arises on a previous floor action, you will have to locate the appropriate minutes. This means you must create an index, either as a separate cross-reference or simply by attaching a small note to each meeting’s minutes listing major subjects discussed or motions passed. You need not include names of Members initiated, transferred, etc., as their membership sheet will give the pertinent dates from which to locate the minutes of the meeting where action was taken.

The Lodge Secretary must also record the proceedings of any Subordinate Forum and assist the Exalted Ruler in conducting it in strict compliance with our Laws, which are detailed in Chapter 8 of the current Statutes. Your Lodge may never have to conduct a Subordinate Forum. But you should become familiar with Chapter 8 now when you have time to study it and ask questions, rather than later when the need arises and time is limited.

CORRESPONDENCE

In most cases, the Lodge correspondence for which you are responsible will be the only contact your Lodge has with others in the Order, including those at Lodge, District, State or Grand Lodge levels. Just as you earnestly perform your duties, so do they, with your assistance required. If you respond promptly and cooperatively to the Elk with whom you are communicating, you will serve your Lodge and the Order satisfactorily.

Conflict in Lodges can result when mail addressed by name to the Exalted Ruler, Secretary or other Officer or manager, is opened by others through error or good intentions. Everyone likes privacy, but this is not an absolute right in the context of a Lodge. Inform all new Officers, Committee Members and employees that the Lodge address is not for private mail, and restate this policy periodically. Some latitude is reasonable, such as holding an unopened letter for a week. But the possibility of a Lodge program failing because of information withheld, should override any further delay in opening the letter.

For corresponding with other Lodges, your primary tool will be the annually revised Subordinate Lodge Directory, which will automatically be sent to you. You ensure that Lodge correspondence will reach you by completing the Directory Information Form, which is discussed immediately after this section. By using the correct address for the Lodge or Secretary to whom you write, you ensure as much as possible that the correspondence will be received. Keep this Directory at all times. It is primarily for the use of Secretaries as well as other officials. Should replacements or additional copies for Members be needed, order Code 553700.

Many Districts publish their own annual directory. Should you need one, contact your District Deputy. If none exists, you may need to compile one with the help of the District Deputy. Almost every State Association publishes its own directory annually following the state convention where its Officers are elected and installed. You should contact the State Association Secretary to obtain one. However, names of every State Association President, Secretary, Editor and major Committee Chairpersons appear in the Grand Lodge Directory of State Associations, which is automatically sent to you after the annual Grand Lodge Session. Additional copies can be ordered from the Grand Secretary [Code 553800]. At the front of this same Directory are names, addresses and telephone numbers of the Grand Exalted Ruler and other current Grand Lodge Officers and Committees. Here also appear the Grand Trustees, Past Grand Exalted Rulers, Grand Lodge Commissions and Agencies. Use it to direct correspondence to the proper persons in Grand Lodge. (*See Address Guide, Page 50*). On each State’s page in this Directory appear all current District Deputies. Also, the most frequently contacted Grand Lodge Officials are listed in the Grand Lodge Newsletter published after each year’s Grand Lodge Session.

GRAND LODGE/GER AWARDS & CONTESTS

Also important to outgoing Lodge communications are requests to the Grand Secretary and Grand Lodge Membership Committee for various awards for recruiting new or reinstated Members. Notwithstanding any in-Lodge incentives, Grand Lodge wants to ensure that these dedicated Elk Recruiters are suitably recognized. Familiarize yourself with the requirements for these national awards, and forward recipients’ names when your records show they have earned our gratitude and praise.

The outstanding activities of every successful Lodge result from teamwork, and your position gives you responsibility for bringing recognition to Members who have been a credit to your Lodge in your community. Throughout the year, you will receive entry forms for numerous contests that merely require you to recap the Lodge goals that have been accomplished. We ask you to return those completed entry forms for the services that your Officers and Members performed. (*These forms do not include those designated for the person or committee to fill out.*) In our volunteer system, saying “Thank You” through these contests and awards help keep the volunteers donating their time and energy.

DIRECTORY INFORMATION FORMS PACKET

One item required to be verified or adjusted annually is your Lodge list of ZIP Codes from which you may statutorily recruit Members. Before a Secretary either enters the same ZIP Codes as the previous year or arbitrarily chooses new ones, the Secretary should consult with the Lodge Officers and the District Deputy. If another Lodge has relocated or a new Lodge instituted nearby, or a neighboring Lodge closes, the list of ZIP Codes assigned to your Lodge will need to be adjusted. Affected Lodge Officers, assisted by the District Deputy, should discuss the fair allocation of territory among

the Lodges. This same discussion will also ensure that no schools, veterans facilities or communities are left out of Lodge-administered programs such as ENF Scholarships, Hoop Shoot®, Veterans Service and others. Once determined, this ZIP Code “footprint” for your Lodge can be entered and “reserved” for your Lodge permanently unless further change occurs. Anytime your Lodge jurisdiction changes, you must contact your District Deputy, who will make recommendations to the Sponsor. If your Sponsor concurs, he or she will advise us to make the changes.

The last part of the Secretary’s duties connected with the Grand Secretary involves the Lodge’s Past Exalted Rulers. The PER’s are listed by ascending Lodge Number at the back of each Subordinate Lodge Directory. In the year since a Lodge’s last Directory submission to Grand Lodge, some changes will probably have occurred in that list. Because each person named is also qualified to vote at the annual National Convention, this list is more than a record of Lodges’ living Past Chief Executive Officers. Lodge Secretaries should add the name of the Exalted Ruler who will complete the term for the Subordinate Lodge year just ending, plus any PER who transfers in or reinstates. (*Give the year served as ER, regardless of Lodge*). Likewise remove the name of any PER dropped, expelled, suspended, dimitted out or deceased. For any deceased PER whose name you remove from the one list, these names should be submitted on a separate sheet, which is the basis for a Past Exalted Rulers Memorial list or Necrology published annually as part of the Grand Lodge Proceedings.

THE ELKS MAGAZINE OBITUARY NOTICE

Every Lodge Secretary is to report to the editor of *The Elks Magazine* the passing of fellow Lodge Members who had been a Past District Deputy or of a higher position in Grand Lodge so that official notice can be given to everyone in the Order. Whether informing the Magazine of the death by telephone, e-mail or in writing, give the deceased’s full name and dates of birth, death and initiation into the Order, positions held with years of service and Lodge affiliation. This will ensure that the proper honors will be shown to those who have given exemplary service to Elkdom.

MEMBERSHIP REPORT TO GRAND LODGE

The Secretary is required to furnish two statistical reports to Grand Lodge each year. These reports are due April 1st and November 1st, and are filed electronically using the CLMS reporting system at <http://www.Elks.Org/ChicagoLMS/>. (*Also see Section II, Page 22*)

It is the duty of the Secretary to maintain the Lodge membership tracking and reporting records by use of the CLMS program. Membership information entered into the CLMS program must be backed up at the Lodge level as well as the Grand Lodge “offsite” location every time membership information is entered into the CLMS program. It is imperative that the membership records be fully and accurately completed, with backup files in Chicago. Please be advised that the starting number of all reports (Line 1) cannot be changed. Proper record-keeping must be maintained.

Sometimes the membership reports indicate that some Secretaries do not properly define delinquents. Dues are payable IN ADVANCE and hence on April 1. If a Member does not have a card indicating his or her dues are paid beyond the day before (March 31), he or she is six months delinquent; if a Member does not have a card showing his or her dues paid beyond the preceding September 30, that Member is one year delinquent; and if his or her card shows the Member is only paid to March 31 of the previous year or before, he or she is more than one year delinquent. (*Our Statutes do not provide any grace period for paying dues after the due date.*)

The most critical report that must be made by the Secretary is the Annual Report. The Annual Report is to be completed by the Secretary and electronically transmitted via CLMS to the Grand Secretary’s office along with the Grand Lodge dues before May 1. By February 1 each year, the Grand Secretary will send to every Lodge Secretary notice of the full Per Capita Grand Lodge Dues and Assessments required to accompany that year’s April 1st Membership Report.

Instructions for electronic filling the April 1st and November 1st Membership Reports can be found on the CLMS Web site at <http://www.Elks.Org/ChicagoLMS/>. (*Also see Section II, Page 22.*) Annual per capita and assessments payments are based on the reporting figures stated on the April 1st membership report and must be sent to Grand Lodge within 5 days of filing the Annual Report.

Contents of this Annual Report — both the membership figures on Page One AND the Charitable Statistics on Page Two — are so important to the continued operation of the Order that Lodge failure or tardiness in filing the reports carries a \$100 fine and possible probation or harsher penalties. The Grand Secretary must have the Annual Report as soon as possible after March 31 to have all the figures printed before the Grand Lodge Session.

Most important is that the Annual Report be accurate, complete and filed promptly so that a true picture of the Lodge membership, financial condition and charitable contributions may be reflected in the Annual Reports of Grand Lodge. Distribution of the November and Annual Membership Reports other than to the Grand Secretary, are not required unless requested by the Sponsoring Past Grand Exalted Ruler.

REPORTING OF CHARITABLE STATISTICS

As mentioned previously, you should supervise the entry of dollars, hours and other vital statistics into the Charity Records Booklet or directly into the Chicago Lodge Membership System at <http://www.Elks.Org/ChicagoLMS/>. (*Also see Section II, Page 24.*) While you do not personally conduct all the community service, veterans, youth and patriotic programs of the Lodge, you should ensure that every committee brings their figures to you after giving a final report to the Lodge. As soon after the Fraternal year ends on March 31, and before April 30, your total charitable figures must be filed directly into the

Chicago Lodge Membership System. Also, be advised that the Annual Report forms are no longer mailed to Lodges to be filled out and returned to the Grand Secretary. Only the Charity Records Booklet is mailed to Lodges to assist Secretaries in compiling Lodge charitable statistics during the year.

MERGERS

While Lodge mergers are infrequent, they do require much activity by both Secretaries, such as producing up-to-the-minute statistics so Lodge Officers and Members can accurately and quickly evaluate each Lodge's assets and liabilities. Grand Lodge will supply ample directions in accordance with Sec. 11.060 for properly handling all aspects. But two particular duties of the Secretary for the Lodge existing AFTER the merger bear special mention:

MEMBERSHIP REPORTS: All such mergers will have an Effective Date, either stated in the Grand Exalted Ruler's Executive Order, which authorizes one Lodge merging into the Lodge that continues after the transaction, or the Institution Date for Lodges, which combine all their assets and memberships to form a completely new Lodge. Extremely important to the surviving Lodge is that the April 1 Membership Report (*as well as the November 1 Report when applicable*), which is due AFTER the Effective Date, accurately accounts for the Members added to its rolls. While it is relatively simple for Grand Lodge to reduce to zero the numbers previously shown under the closing Lodges without even the need of a report, the surviving Lodge must make sure to add in every merger-acquired Member as AFFILIATING BY DIMIT on Line 3 (*must be done here since no "MERGER" Line exists*), plus those individual Dimit/Certificate of Release cases coming in from other non-merger Lodges.

INDIVIDUAL MEMBERSHIP NUMBERS—ADDED MEMBERS: When one Lodge merges into an existing Lodge, the Secretary of the surviving Lodge (*one which has the same Lodge Number, even if Lodge name may change*) MUST ASSIGN NEW MEMBERSHIP NUMBERS TO ONLY THOSE COMING ONTO THE SURVIVING LODGE'S ROLLS FROM THE ABSORBED LODGE IN CONTINUANCE OF THE SAME SEQUENCE AS THE NUMBERS ASSIGNED UP TO THAT POINT. If both Lodges cease to exist in order to create a new Lodge, ALL MEMBERS MUST BE ASSIGNED NEW MEMBERSHIP NUMBERS. Grand Lodge records depend on correct membership roll numbers, so it is critical that the roster maintained at The Elks Magazine Circulation Department be updated with the new numbers for these Members AS SOON AS POSSIBLE. For advice on forwarding this large amount of information to The Elks Magazine, call the Circulation Department at 1-773-755-4742.

MEMBERSHIP RECORDS

The Chicago Lodge Membership System (CLMS) is the official membership record keeping and reporting system for the Elks. The computerized system is mandatory for all Lodges. The program is available through the Grand Lodge Web site at <http://www.Elks.Org/ChicagoLMS/>. (*Also see Section II, Page 22.*)

It is the duty of the Secretary to maintain the Lodge membership tracking and reporting records by use of the CLMS program. Membership information entered into the CLMS program must be backed up at the Lodge level as well as the Grand Lodge "offsite" location every time membership information is entered into the CLMS program.

Financial records, money and legal documents should be kept in a fireproof safe or vault.

A Secretary should always know how many Members the Lodge has and the dues status of each.

Every Lodge should have a complete record of every Elk who was ever on its roll. Regretfully, until CLMS was implemented, the Grand Secretary's office had to inform many Secretaries inquiring about a former Member's record that NO GRAND LODGE OFFICER OR AGENCY had these records (other than the current membership roster for mailing *The Elks Magazine*). ONLY the Subordinate Lodges had this information.

Use of the CLMS program will now allow tracking of this information.

PROPOSER'S DUTIES

An Elk may propose or "sponsor" a candidate for membership in the Order, but the Secretary represents the Order's Laws and Lodge's interests. The Proposer makes the first evaluation of the candidate's worthiness and explains what membership in the Order involves. That person helps in submitting a completed Membership application and participating with the candidate even after initiation. The Proposer should likewise ensure that the statutory timetable for processing the application is followed, and explain any delays to the candidate, who has no rights or voice within the Order at this stage. Conversely, the Proposer is responsible for explaining to the candidate if the application is incomplete or invalid, if sponsorship is withdrawn at any point before the ballot, or in case of a negative ballot. ONE IMPORTANT POINT: Section 14.020 was changed in 2002 to permit ANY ELK to propose a qualified person for membership in ANY LODGE. But read this Section thoroughly as there are some conditions with which a Secretary must be familiar.

PROCESSING CANDIDATES & APPLICATIONS

REMINDER — The official Membership application and is a two-sided sheet folded down to pocket-size. Use only this current form and destroy any older (4-page) forms, which had requested information that is no longer required or allowed.

A properly completed application (*Appendix—Exhibit D*) received by the Secretary, should be placed in a folder marked "New Applications to be Read at the Next Lodge Meeting."

After the application has been read in the Lodge, it should be turned over to the Investigating Committee. A record of the application should be kept by the Secretary in case the application is misplaced. In some Lodges a form is provided for the report of the Investigating Committee or the report can be made by the Investigating Committee on the application form itself. But in either event, a folder should be used marked "Applications in the Hands of the Investigating Committee."

After the Investigating Committee has acted, the application should be transferred to a folder marked "Ready for Balloting." If the ballot is favorable, then the application should be transferred to a folder marked "Ready for Initiation." A Notice of Election form (*Appendix—Exhibit L*) is available. Along with notifying candidates of election to membership, you will have to inform them of the dates and times to attend both indoctrination (*see following section*) and initiation. To clarify one important point: SINCE 1983, IT IS ILLEGAL UNDER OUR LAWS TO HOLD BALLOTING ON AN INDIVIDUAL AND THEN INITIATE OR REJECT THAT PERSON ON THE SAME NIGHT! We have heard complaints of some Lodges that persist in this practice, resulting in some candidates expecting to become Members, being sent away uninitiated. Section 14.030 states that, if elected, the candidate is "entitled to initiation at any SUBSEQUENT meeting within four months."

When indoctrinated and initiated, the new Member should be assigned a permanent sequential membership number and sign the Constitution and By-Laws book. No membership numbers should ever be duplicated. Make sure you have the spelling of the Candidate's name and correct mailing address. After initiation the Statutes require you to give the candidate the latest Constitution and Statutes of the Order, the Lodge By-Laws and the booklet, "What It Means To Be An Elk." Your Lodge must maintain a sufficient supply of these three items for the District Deputy to verify during his or her yearly visit.

After the candidate has been initiated, add the name to your CLMS membership database and send a timely backup to the Grand Lodge so the candidate may begin receiving his or her copy of *The Elks Magazine*.

*If the Candidate is rejected when the ballot is taken, write a letter advising that the application has not been favorably acted upon and return the fees paid. In your letter, do not offer any explanation for the unfavorable ballot or advise that re-application may be made in six months. These actions are outside the authority of the Lodge Secretary. Keep the application or record of it in a dead file.

INDOCTRINATION INVOLVEMENT

Every candidate for membership is required to be indoctrinated before initiation about the principles, goals and activities of Elkdom. To accomplish this, each Lodge has been supplied a video for viewing by candidates. All Lodges are urged to supplement this with information concerning their own Lodge, District and State activities.

Because of the Lodge Secretary's required involvement in processing candidates, from submitting the application through initiation, you also will probably be part of the Indoctrination Committee. However, with the backing of the Exalted Ruler, stress to all Officers that your participation will be limited to technical director (*to run the projector, VCR or DVD player for the prerecorded segments*). The other Indoctrination Committee Members, and as many of the Lodge Officers as possible, must participate in and deliver the "live" portions to make the indoctrination informative and enjoyable for these candidates and their families. Your advance duties include: scheduling the indoctrination date and place; inviting the candidates AND THEIR SPOUSES AND FAMILIES; notifying the Indoctrination Committee, Officers AND THE CANDIDATE'S SPONSORS for their attendance; repeatedly inviting current Members to see the presentation; and possibly inviting prominent non-Elk leaders to learn how our Order benefits their community. Set up the equipment ahead of time, handle any arriving candidate's paperwork, give them name-tags to make getting acquainted easier, and put them in the hands of the Officers and their Sponsors for a pre-show Lodge tour, dinner or hors d'oeuvres. Start the actual presentation on time, and then let the Exalted Ruler, Officers and Indoctrination Committee run the show based on suggestions in the Indoctrination Manual.

REINSTATEMENTS, TRANSFERS & MERGERS

(NOTE: If a former Member's facts relating to previous membership are unclear, you may receive verification from the list maintained in the Grand Secretary's office. If the Member had been expelled or suspended, he or she would have to apply for and receive a pardon or commutation of the suspension before you would be permitted to process the reinstatement/affiliation.)

A former Elk may be reinstated in the former Lodge by secret ballot after paying the reinstatement fee prescribed by the Lodge By-Laws as well as the pro rata amount of dues. The former Member should fill out the Reinstatement Application (*Appendix—Exhibit E*) and be processed as the application of a new Member. When reaffiliated, the Member's old membership number should be restored.

A Member dropped for nonpayment of dues, who now lives within the jurisdiction of another Lodge, may apply for membership in another Lodge by paying a \$20 fee and filing the Request for Certificate of Release with the former Lodge (*Appendix—Exhibit G*). Granting of the Certificate of Release (*Appendix—Exhibit I*) is mandatory but the issuing Lodge may make recommendations to the affiliating Lodge for reinstating an unaffiliated Member. This Release will allow the person to fill out the affiliation forms per Section 14.180.

Occasionally, an unaffiliated Elk will apply to the former Lodge (or another where now residing) for reinstatement, only to be informed that no record of former membership can be found. Elks Statutes do not provide recourse, but Grand Lodge has stipulated that the Lodge allegedly in possession of the record must exhaust every means of locating or

recreating it, and, second, that the burden of proving former membership must rest with the person requesting reinstatement. If the unaffiliated Member can produce some documentation (*ideally an old membership card, old dues billing statement or official proceedings of an Elks function that lists or designates the unaffiliated Member as an Elk*), the Secretary may process the reinstatement. The Secretary could also accept an affidavit from two Elks in good standing that the individual previously was, to the best of their knowledge, a Member. For reinstating without verification of when the previous Member began active service, the Secretary shall notate the records accordingly and explain to the reinstated Member that any question related to length of service must be based on the current reinstatement date. In the absence of proof, of course, the qualified applicant shall be initiated as a new Member.

If a paid-up Member has moved into the jurisdiction of another Lodge and desires to join the other Lodge, he or she must file a written Request for Transfer Dimit (**Appendix—Exhibit G**) with his current Lodge. Such request should be made promptly (*without a floor vote, since 1989*) and the completed Transfer Dimit (**Appendix—Exhibit H**) mailed to the Lodge Secretary in which the Member has requested affiliation. The Transfer Dimit must be granted if the applicant is a resident of the Lodge with which he or she wants to affiliate, if the applicant's current dues are paid and he or she is under no other obligation to the Lodge and if no charges are pending against the applicant. The Member's name should not be removed from the rolls of your Lodge until the other Lodge has notified you of his or her acceptance, effective the date of the affirmative ballot.

An applicant for affiliation by Transfer Dimit into your Lodge should be required to fill out an Affiliation form (**Appendix—Exhibit F**). The Dimit should then be processed as a new application. If elected, the Member should be assigned a new membership number. The dues of a Member received by the Lodge on Transfer Dimit shall commence with the semi-annual period after which he or she has paid dues to the Lodge that granted the Transfer Dimit [Section 14.110].

When the affiliate has been accepted, the new Lodge Secretary should immediately notify the Lodge from which he or she has transferred. This may be done by letter or sending the completed coupon in the Transfer Dimit book.

Our Statutes permit a Member to resign. A Member in good standing may, in accordance with Section 14.110, apply (*in writing*) for an Absolute Dimit, (**Appendix—Exhibit J**) which shall be granted, again without a floor vote. The Member then becomes an unaffiliated Elk and should be removed from the Lodge's active rolls [Section 14.120].

NOTE: Sometimes in a disagreement, a Member may tear up his card and say he "quits." But the Secretary must keep the Member on the Lodge rolls unless he or she submits a signed request for an Absolute Dimit or is dropped. Also, after tempers have cooled, the Member must be issued a replacement card should he or she request one as long as dues are still current.

A former Member of a defunct Lodge must apply to the Grand Secretary for a **Certificate of Status** to permit him or her to apply for affiliation as on a Transfer Dimit or Certificate of Release [Sections 14.230 and 14.250].

DUES AND LAPSATION

While no "cure-all" for lapsation may exist, the Lodge Secretary working with an active Lapsation Committee can do much to save delinquent Members.

The problem should be addressed year-round by the Secretary and Lapsation Committee. The Secretary should bill the Lodge's delinquents monthly. Since dues are payable in advance, Members should be billed in advance. Many Secretaries bill their entire membership in March by enclosing the billing form and remittance envelope (**Appendix—Exhibit M**) in their monthly bulletin, indicating that the bill may be disregarded by those who have paid before receiving the bill. A good idea is to start billing for the new year about February 15 and then again on March 15 and the first of each month thereafter to those still not paid. With this system many Lodges begin the new year on April 1 with more than 50% of the membership paid up.

The Secretary should also constantly keep on top of delinquents by transferring their membership ledger sheets to another file or by using different colored file signals. In addition, the Secretary should follow the program outlined in the lapsation section of the Membership Manual to keep up the comparative membership and lapsation figures. He or she should review the figures with the Exalted Ruler and Lapsation Committee the first of every month and report them at the next Lodge meeting. Every Lodge should try to improve on the previous year's figures.

MEMBERSHIP CARDS

An Elk who has paid the required Lodge and Grand Lodge dues and assessments is entitled to receive a Membership Card bearing the Lodge seal and signed by the Secretary and Member. The Lodge seal should be imprinted on every card to protect against forgery.

Only BPOE membership cards supplied by the Grand Secretary may be used by Lodges and Members. Lodge Secretaries **MUST HAVE CARDS TO ISSUE BEFORE** the next Lodge year begins each April 1. Some Lodge Secretaries fail to place their card orders despite numerous reminders from the Elks National Headquarters. After six months of reminders, the Grand Secretary's office will issue a minimum supply of basic cards to permit the Lodge to continue operating, with the Lodge required to pay for the "forced" cards. Every fall, keep your eye open for the card order form, and act on it promptly. Lodge Secretaries who fail to act should not expect a waiver of the Lodge debt on grounds that the cards they receive do not match their specifications.

Since the color of the card is changed annually on April 1, no cards should be issued to show a payment beyond the life of the card. If a Member pays dues from October to October, the card should be issued only to April 1 and the Member given a receipt for the six months' dues from April 1 to October 1. The entire amount should be posted and a new 6-month card issued to the Member on April 1.

NOTE: Lodges are now allowed to amend their By-Laws to require payment of FULL-YEAR DUES ONLY. Secretaries should confer with other Lodge Officers to consider this option to save on bookkeeping time.

Before issuing annual cards to Life and Honorary Life Members, those Members are required by Statute to pay the Grand Lodge per capita dues and assessments, State Associations dues and, when provided by Lodge By-Laws, a Lodge administration expense of not less than \$5 nor more than half of the regular Lodge dues. Identification cards for the spouses of Lodge Members or the family of deceased Members should be issued upon request in accordance with Section 14.140 and at no charge.

In many Lodges, the House Committee issues ASSOCIATE MEMBER Cards to Members of other Lodges who use the Lodge's recreational facilities. For this purpose, these Lodges are advised to have their Secretary annually order extra ID cards. The House Committee can then simply stamp the cards "ASSOCIATE MEMBER" using an inexpensive rubber stamp. Be advised, though, that the Associate Member Program means that the Secretary must also keep a separate file of these individuals, their "home" Lodges and any collected fees. Such "Associates" are NEVER counted along with the Lodge's actual roll Members on any Grand Lodge-required Membership Reports. If your Lodge applies stickers to cards bearing years of membership, positions held, etc., the Secretary is responsible for maintaining the information needed to furnish the correct sticker with each card. While Lodge "customs" vary regarding the year stickers, the one "rock-solid" common rule is that ONLY ACTIVE (*in good standing*) YEARS can be counted! Improved dues collection can result from using the "Early Bird" sticker, which denotes those who have paid their Lodge dues in advance of the next dues period. While the Grand Secretary does not supply these stickers, his office can suggest where they may be obtained.

When a membership card is issued, a record of the dues, initiation, affiliation or reinstatement fee (if any) should be entered into the cash book and posted on the Member's loose-leaf membership sheet in the visible-record book and/or ledger. Dues collected, as well as any other funds received by the Secretary, should be turned over periodically to the Treasurer and a receipt given the Secretary. Mention must be made of the statutory restriction regarding changes in a Lodge's dues. These cannot be charged to Members until the April 1 after the date of approval by the Grand Lodge Committee on Judiciary.

Each fall, the Grand Secretary will send Lodge Secretaries an order form for the next year's membership cards. If you have not received this form by October 31, call or write the Grand Secretary for one. Based on shortages or excess cards of the four types of cards — Regular, Life, Honorary Life and

Identification (or spouse) cards in the Secretary's possession — estimate your needs for the coming year, complete the form following the accompanying instructions, and return it to the Grand Secretary's office as soon as possible. While the factors involved in printing and shipping more than 3 million cards to approximately 2,000 Lodges prevent promising a definite ship date for your cards, the sooner ordered, the sooner you receive them. Be sure to retain the Lodge file copy for reference. For questions about the various options available for the cards, call the Membership Card Hotline at 1-773-755-4748 or write the Grand Secretary rather than order the wrong cards. Once the cards are imprinted with your Lodge name, they are useless to anyone else, and the Lodge must pay for your error. Once received, examine the cards to determine if all ordered were sent you, and then store them in a dry and locked area until used. Additional cards can be ordered any time throughout the year.

Each April 1, destroy all card stock from the previous year so that none can be forged by someone not entitled. Also, regardless of sentimental attachments, there are no valid reasons under our Laws for issuing an obsolete card, and a Member who pays the yearly amount as of October 1 should be given a half-year current card plus a receipt for either the past or future half-year dues.

LIFE MEMBERS

If your Lodge has provisions for Life Memberships, you should familiarize yourself with Section 14.260 of our Statutes that deals with Life Memberships either purchased or attained by length of membership. Also note Section 14.270 concerning Honorary Life Membership granted for Distinguished Services, in addition to the specific limitations that your Lodge is permitted in its By-Laws. These may include maximum number of Life Members allowed, higher age or length of membership (*either total or in Lodge where applying*), greater price for purchased type and many other variations above the minimums stipulated by Statute. **NOTE:** When calculating the amount for a PURCHASED LIFE MEMBERSHIP, the Life Member will still be obligated to pay the Grand Lodge and State Association portions plus an administration expense fee every year. Multiply "25" (*or other multiplier stated in your By-Laws*) times only the Lodge's portion of the Member's full annual dues [see By-Laws, Article X, Sec. 2(c)].

Our Statutes do not require every Lodge to offer Life Memberships. Lodges may decide the matter based on their particular circumstances. Before taking action, Members should consult both their Lodge By-Laws and the Order's Statutes. The Secretary has an interest in keeping a constant supply of both books available to Members to head off conflict resulting from misinformation. No Life Memberships are granted automatically upon reaching the requirements published in the Lodge By-Laws. Each Member seeking Life Membership must apply in writing to the Lodge Secretary. There is no set form. Once received, the request should be reviewed for verification and, if found eligible, submitted to the Exalted Ruler for setting the Lodge vote (*not later than the third regular meeting after the meeting in which the application is announced*).

Remember that there must be both an application and a separate vote for each applicant. Voting for a group is not permitted. (*Secretary-supplied paper ballots with all eligible names listed with "YES" and "NO" boxes satisfy this*). While applicants may be elected any time, most Lodges set aside a special night for inducting newly-elected Life Members. Regardless of when a particular Member is elected to Life status, the special card and reduced dues do not become effective until April 1 of the succeeding Lodge year.

Our Laws also provide for a Life Member to apply to transfer his or her Life status to another Lodge, either on or after the point at which the Member applies for the Transfer Dimit. The vote on the Life status must be separate, and usually held before the vote on the Transfer Dimit itself, should granting of the Life Membership be an applying Member's condition for pursuing the transfer. The request for the Life Membership Transfer must be submitted to the Lodge Secretary in writing as part of the application process, and each applicant must be voted on separately and receive a 2/3 majority approval. **NOTE:** Honorary Life Membership CANNOT be transferred!

LABELS FOR LODGE USE

Your care in keeping up your Lodge roster in the Magazine Circulation Department becomes apparent when you mail the Lodge bulletin or notices to your Members. Preprinted mailing labels can be obtained inexpensively from *The Elks Magazine* Label Department. We suggest you contact the Label Department for current offerings, or submit an order online through the Secretary Resource page at <http://www.Elks.Org/ChicagoLMS/>

STRAY ELKS

A Stray Elk is one in GOOD STANDING who has moved from the jurisdiction of his home Lodge and now resides permanently in the jurisdiction of another Lodge. Many of these Members may eventually take Absolute Dimits or be lost to our Order for nonpayment of dues unless they become interested in the activities of the nearest Lodge.

When Members are living in the jurisdiction (*based on the Lodge's ZIP Code "footprint"*) of a Lodge other than their own, the Grand Secretary sends a "Stray Elk" report to the Lodge of residence.

Names of all Stray Elks residing in your Lodge jurisdiction should be added to your Lodge mailing list. Your Lodge is advised to write these Members, welcoming them to your community and inviting them to visit your Lodge. However, this is no substitute for personal contact. If possible some Lodge Member who lives nearby should be assigned to invite the Stray Elk to take advantage of the facilities of your Lodge. Grand Lodge also urges that every Lodge hold a "Stray Elks Night" at least once a year, inviting them to join your Members for fellowship.

In metropolitan areas where some Lodges may be in close proximity to each other, Elks who are Members of one Lodge may show up on a neighboring Lodge's Stray Elk list because they reside in that Lodge's jurisdiction. Common

sense dictates that these individuals not be pursued as Stray Elks. Contact those Elks who have moved from another state or those who are not Members of neighboring Lodges.

If your Lodge is just starting up a Stray Elk program, or if your program needs a fresh start, a complete listing of Stray Elks can be obtained from the office of the Grand Secretary by requesting the RPTX0160 printout. This printout is formatted so that you can copy the names and addresses onto Avery #5351 copier labels.

REVISION OF BY-LAWS

By-Laws for use as a guide by Subordinate Lodges are prepared annually by the Committee on Judiciary. Each year the Grand Secretary mails these revised By-Laws to each Lodge and keeps a supply for the Subordinate Lodges. In some years little or no change is made in these By-Laws, making a revision by the Subordinate Lodge unnecessary. However, by Statute, every Subordinate Lodge must make a general revision of its By-Laws at least every five years and more frequently if warranted by changes either made by Grand Lodge at its annual July session or by the Subordinate Lodge. Statutory changes approved by Grand Lodge automatically go into effect 30 days after the July session and thus supersede those Statutes and By-Laws previously existing throughout the Order. But as Lodge Officers, the Exalted Ruler who attended the Grand Lodge Session, assisted by the Secretary, are responsible for making sure all Lodge Members are informed of all changes, as these affect their rights and duties of membership.

When an existing Lodge needs a general revision of its By-Laws or a Lodge in formation prepares to adopt its first By-Laws before Institution, a By-Laws Committee should be appointed and given the Order's latest Constitution and Statutes, as well as four copies of the latest Judiciary-approved Lodge By-Laws [Code 520501] available with an accompanying instruction sheet on request from the Grand Secretary. The Committee should then prepare its recommendations for changes to be presented for Lodge action. To make the proposed By-Laws representative of the Lodge, announcement should also be made that, in addition to changes recommended by the Committee, all Members may propose other changes. To ensure approval by the Grand Lodge Committee on Judiciary, the Lodge should study all pertinent sections of our Order's Statutes and, wherever possible, use the wording as printed in the guide By-Laws booklets. After favorable Lodge floor action, prepare three complete copies of the By-Laws booklets, as well as the general revision review check sheet, and send them to your Area Member of the Committee on Judiciary. The committee member will notify you of approval or disapproval with corrections indicated. He or she must also approve individual amendments to By-Laws sections, house rules, authority to publish a Lodge bulletin and Lodge incorporations. The committee member should also be contacted by a Lodge Officer whenever the Statutes need interpreted for clear-cut action. In these cases approval or interpretation must be obtained BEFORE further activity.

As Secretary you are required to present your Lodge By-Laws to each new Member. Within one year of the general revision approval, you may order printed By-Laws through the Grand Secretary (300 copies minimum order at prices far below those possible from local printers.) Every Secretary is advised to order enough to last the five years until the next general revision is required. When ordering these By-Laws with your Lodge's figures already entered, you do not have to send your Lodge's approved By-Laws, as Judiciary automatically sends them to the Grand Secretary. Since the printing takes 2-3 months, you may have to paste in entries by hand in the By-Laws booklets you have on hand for new Members until the next printing is shipped to you. This is acceptable practice. You may also order any quantity of the By-Laws Guide booklets (with blank spaces) during the five years after a general revision approval, but you must then enter the appropriate figures in the spaces throughout each book. Needless to say, when a Lodge violates the Statute requiring the 5-year general revision, Judiciary will not approve any isolated amendments submitted, nor is the Grand Secretary permitted to ship large quantities of By-Law Guide Booklets or to order printed By-Laws until the Lodge regains compliance by having a current general revision submitted and approved.

INCORPORATION OF SUBORDINATE LODGES, and BUYING, LEASING OR SELLING LODGE PROPERTY

Actions that seriously affect Lodge life and status under both the Laws of the Order and community require a great deal of planning. Since the Statutes change from time to time, and only those in effect at the time the action is contemplated govern, we urge your Lodge to read and discuss the applicable Statutes at great length at that time. Also, if necessary, contact your Area Member of the Grand Lodge Committee on Judiciary (Incorporation) or appropriate Grand Trustee (Real Estate Transaction) for guidance.

Our Statutes cover these topics in detail, but several points should be made regarding your duties in connection with them. First, because the welfare of all Lodge Members is involved in the decisions, take special care that they are all informed of the complete situation and notified to take part in any votes or discussions affecting them. Second, be sure to keep your Past Grand Exalted Ruler Sponsor(s) and District Deputy up to date on all developments for the good of the Order. Third, for a consultant on these matters, as well as other matters in the Lodge, you should establish a friendly relationship with a Lodge Member or Members who are in the legal, financial and real estate professions. If none of your Lodge Members is so qualified, we suggest that the Membership Procurement Committee emphasize their recruitment.

THE LAWS OF OUR ORDER

A Secretary must become familiar with the Laws of our Order. They are easily understood and may be found with the help of the index. When in doubt or in differences of

opinion, you should write your Area Member of the Judiciary Committee for an authoritative opinion. When you write, detail all the facts and circumstances involved.

ELECTIONS — ANNUAL AND SPECIAL

During elections, potential exists for misunderstandings that can damage the friendly relations necessary for any progress and fraternalism in our Lodges. Long before any election — the annual balloting in February or a special election to fill an unexpected vacancy — you can minimize friction by studying Statute Sections 3.080, 3.090 and 12.150. They are aimed at notifying the full membership of the candidates for office, and having any needed ballots and paraphernalia prepared in advance.

In addition, our Laws permit a candidate to campaign for a Lodge Office but not “by any public method or appeal” through the media for example. [Sec. 9.070.f.]. Also, you are not permitted to provide membership lists or addresses to any Members for any purpose including campaigning. Any Committee Members who have such lists to perform their Committee duties are not permitted to use the lists for campaigning. The Exalted Ruler should enforce these restrictions under his power of appointment and removal for any offending Committee Member. Another type of election for which you must prepare ballots and notify the membership is covered in the Life Membership section of this book.

LODGE BULLETIN

Many Secretaries act as Lodge bulletin editor/publisher in addition to their other duties, primarily because they are most knowledgeable of the ongoing Lodge activities. When accepting this responsibility, notify all Lodge Officers, Committees and Members of your need for advance information on all Lodge matters, emphasizing the deadline for submitting articles.

Publishing a monthly article from the Exalted Ruler is a good idea, in addition to regular features from other Officers or Lodge auxiliary. If your Lodge serves meals, listing of menus will help attract more Elk families. Most bulletins include a calendar of Lodge events. As explained later, you should let Lodge Members know that they can consult their current District Deputy, whose name, address, phone number and email address should be listed in every Lodge bulletin.

Also, make sure you are on the mailing lists of bulletins from as many Lodges, Districts, State Associations and other Elk groups (*bowlers, golfers, RV clubs, etc.*) to provide source material. In addition, you should maintain a miscellaneous file of humor, sports tips, artwork, BPOE history, etc. in lengths of 5-45 typewritten lines to fill space as needed. We caution editors against using copyrighted material without the permission of the publisher or artist/author.

To offset the expense of the bulletin, you may solicit paid advertising from businesses, but these must be no larger than standard business card size. If the business is of a Lodge Member or an Elk, the advertisement cannot refer to membership in the Order in any way. U.S. Postal Service

regulations governing reduced rates for nonprofit mailings such as bulletins, prohibit certain advertising. Every Lodge should obtain these guidelines from their Postmaster to ensure their publication conforms *(or run the risk of drastically higher postage and even penalties on prior mailings)*.

An alternative to ads is the “Boosters” program used successfully by many Lodges. This is a line-by-line listing of names of families or businesses that contributed funds to defray printing/mailing costs. In considerably less space, the same (or more) revenue is generated without the risk or complexity of ads, and Lodge Members get the satisfaction of seeing their names or memorials in print.

We cannot over-emphasize that neither the advertisements nor the rest of the bulletin can contain any item of a “shady” nature, nor should religious or political viewpoints or candidacies appear in the Elks bulletin.

Extremely useful in preparing bulletins is a copier with enlargement and reduction capabilities, and a convenient source of artwork is a Member’s computer with graphics software. Elks emblems are available free from the Grand Secretary’s office for the use of your bulletin. **DON’T FORGET TO PUT THE GRAND EXALTED RULER, GRAND SECRETARY, PGER SPONSOR, SPECIAL DEPUTY, DISTRICT DEPUTY AND STATE ASSOCIATION PRESIDENT ON YOUR BULLETIN MAILING LIST!** Before you publish your first issue, however, you should verify if your Lodge has received approval to do so by checking with your Area Member of the Grand Lodge Committee on Judiciary. For approval, first have the Lodge vote in favor of the bulletin by following the same procedure as for amending By-Laws, and then submit the request for approval in triplicate to Judiciary, per Section 16.150 of the Statutes.

LODGE TRANSACTIONS REPORT

Membership, and the resulting collection of dues and fees, is vital to the viable operation of the Elks Lodge. As such, an important duty of the Lodge Secretary is the compiling of semi-annual Lodge Transactions Reports as required under Section 12.050 (*m*) of the Grand Lodge Statutes. (**Appendix—Exhibit N**) At the first Lodge meeting in April and October, the Lodge Secretary is to detail membership figures from the previous six-month reporting period. Those figures should include: initiations, reinstatements, delinquencies, number of candidates awaiting initiation, transfers, drops for nonpayment of dues, absolute dimits, deaths and expulsions. They are the same figures that Lodge Secretaries gather for their Annual Membership Worksheet.

Collections should center on the amount of dues collected and to be collected; and also the per capita fees paid and to be paid to Grand Lodge, the State Association and District. The status of the five-year revision of Lodge bylaws also is noteworthy.

YOUR DDGER’S ROLE AS ADVISER

While you have become a “resident expert” on the Laws and procedures for your Lodge and the Order out of necessity, there are still times in the life of every Exalted Ruler and Secretary when a difference of opinion will arise with some of your less-informed Members, which requires a go-between. Those Members may want the viewpoint of some authority from outside the Lodge to settle the matter. Every year in July, a new District Deputy Grand Exalted Ruler is appointed to assist and supervise your Lodge. He or she will provide your Lodge with a picture. Post it prominently on the Lodge bulletin board or photo gallery, of course, but do yourself a favor and provide a “safety valve” for Members who want additional advice or assistance by also posting the DDGER’s business card with the picture so any Member can easily get in touch for advice. With both this in-Lodge posting and the DDGER’s listing in every bulletin, every Member will not only have an additional resource to call on, but will have increased awareness of participation in the expanded world of Elkdom that reaches out into your District and our national Order. And as Secretary, you also have the annual duty of putting up for the Members’ benefit the pictures of our Grand Exalted Ruler, your State’s Sponsoring Grand Exalted Ruler and your State President, as well as any motivational posters. All of these are sent through you to your Lodge throughout the year for good reasons. “Share” them with your Members.

**Manual for the Secretary of an
Elks Lodge, Part II:**

Online Features

www.elks.org

Revised: January 19, 2009

Chapter One: Getting Started

The Elks.org website supports the Chicago Lodge Membership System (CLMS) with a variety of online reports and features. Your free elks.org user name and password allows you to:

- Check the status of your CLMS backups & reports
- Access the CLMS Help Desk and Knowledge Base
- Order lodge supplies
- Submit your charitable giving report
- Update your local lodge "Virtual Home Page"
- Participate in a private, secretaries-only message board

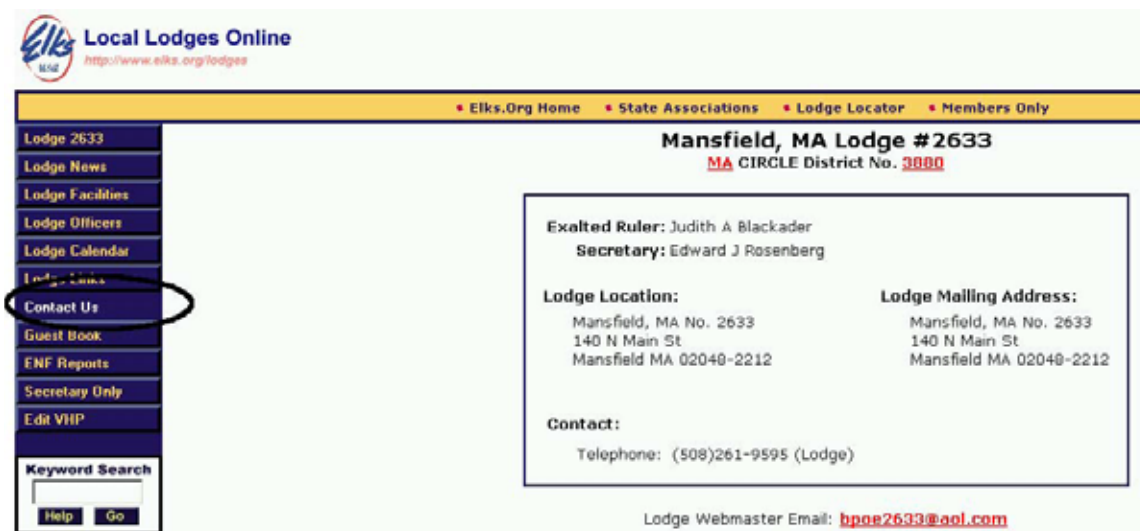
Access to the Elks.org Secretary Resource websites is restricted to current lodge secretaries only, as listed in the Grand Lodge database.

How do I know who the Grand Lodge database lists as secretary?

If you're not sure who's currently listed as secretary of your lodge, it's easy to find out. Simply type your lodge number in the "Keyword Search" box on the Elks.org home page:



Then, click the "Contact Us" link on your lodge page to view the members currently listed in the Grand Lodge database as Exalted Ruler and Secretary of your lodge:



Hey, I'm not listed! How do I get that corrected?

If you're the secretary of your lodge but aren't yet listed on the "Contact Us" page, notify the Office of the Grand Secretary via email (grandlodge@elks.org). Once you're listed in the Grand Lodge database, you'll be able to access the Elks.org Secretary websites with your regular Elks.org user name and password.

How do I get a password?

If you don't yet have an Elks.org user name and password, you can register online here:

<http://www.elks.org/members/registration.cfm>

Registration Reminders:

1. You'll need to submit your membership number in order to register, so be sure to have that handy.
2. Your password will be sent to you via email, so be sure you have access to your email account.
3. The email address you submit must be unique. If another member is already registered under that address, your registration will be rejected. For security and privacy reasons, members are *strongly* encouraged to register with a personal email address rather than a more generic address that might belong to the lodge, such as secretary1234@aol.com. Remember that your elks.org account belongs to you and not the lodge, so you are the only person who should have access to the address that you use to register. (Note that free web-based email addresses are available from Hotmail.com, Google.com, Yahoo.com, and other sites on the Internet.)
4. If your name is not recognized by the system, follow the links to request a "manual" registration, and your registration will be handled personally by the Elks.org webmaster. Your password will be emailed to you within a few minutes.

<p>Important note: although your secretary access privileges will be effective immediately upon registration, your CLMS offsite backup privileges will take 24-48 hours to activate after any new registration or password change.</p>

What if I forget my password?

No problem. Type the Elks.org keyword **reminder** to have your password emailed to the address at which you originally registered. If your email address has changed since you originally registered, use the Elks.org keyword **reset** to delete your original registration so that you can register again.

How can I change my password?

Although your initial password is assigned automatically by the system, it can be changed at any time by typing the Elks.org keyword **password**. This form will also allow you to change your user name and email address. (Note that if you change

your elks.org password, you'll need to wait 24-48 hours before submitting your next CLMS offsite backup.)

What if my password doesn't work?

If you're prompted repeatedly to supply your user name and password, your browser is probably rejecting our "cookies," which are a device used by web browsers to remember your identity as you move from page to page on the web. Check the options, preferences or privacy menu and set your browser to accept cookies and you should be able to access the site without difficulty.

How come my password allows me onto elks.org, but won't allow me to submit CLMS backups?

Passwords on elks.org are not case-sensitive, but passwords on the CLMS backup server *are* case sensitive, so be sure to type your password in exactly the same way that it was created. (Type the Elks.org keyword **reminder** if you can't remember the proper casing.)

Remember, too, that your password will not be available for backups for 24-48 hours after your initial registration, or after any change to your elks.org password.

Chapter Two: Getting Around

Type the Elks.org keyword **clms** to go directly to the main menu of the CLMS website (<http://www.elks.org/ChicagoLMS>):



Click around to explore the various menu options:

Home: News & Links of interest to lodge secretaries. Be sure to visit at least once a week for updates from the Grand Lodge.

Downloads: Download the latest version of the CLMS software package.

Reports/Forms: Download a copy of your membership roster as currently held in the Grand Lodge database, or view copies of the membership reports you've submitted to Grand Lodge. Download various printable forms in Adobe PDF format.

Supplies: Order lodge supplies or membership cards from the Grand Lodge Shipping Department.

Admin: Validate the identity of Elks.org users from your lodge, or appoint a "Cyber-Assistant" to assist you with updates to your Virtual Home Page.

Secy Message Board: Participate in a private message board for lodge secretaries only.

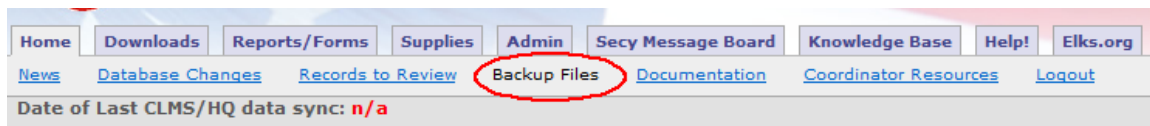
Knowledge Base: Search for answers to your questions about CLMS.

Help!: Learn how to contact your CLMS Coordinator for help with your software, or submit a technical question to the CLMS Help Desk.

Elks.org: Return to the regular elks.org website.

Chapter Three: CLMS Data

Data backed up "offsite" from your CLMS software is integrated automatically into the Grand Lodge Membership System. You can check the status of these backups by clicking the "Backup Files" link from the CLMS Main Menu:



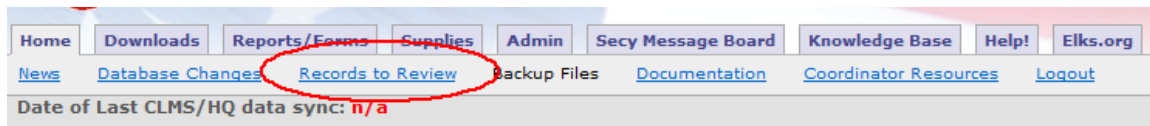
Note that backups are processed overnight, so a backup submitted on Monday afternoon won't be reflected in your backup report until Tuesday morning.

How do I do an offsite backup?

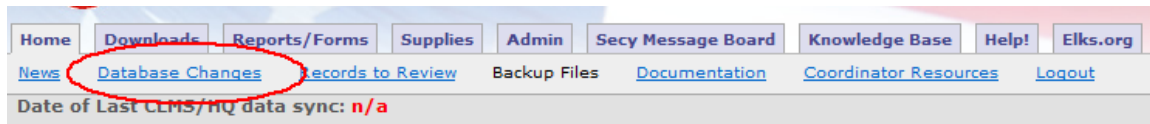
The CLMS software will prompt you automatically to backup your data, and will step you through the process. For more details, click the elks.org keyword **backup**, which will take you directly to the online CLMS documentation:

www.elks.org/SharedElksOrg/chicagolms/webhelp/html/index.html?howtobackupdata.htm

After your backup files have been integrated into the Grand Lodge membership system, there may be "exceptions" that require additional processing, such as member name mis-matches, or membership transfers. The Elks Magazine Circulation Department will email you about these transactions, which can also be reviewed online by clicking the "Records to Review" link from the Main Menu:



In addition to these transactions, you should also check for database changes submitted to the Circulation Department by the U.S. Postal Service:



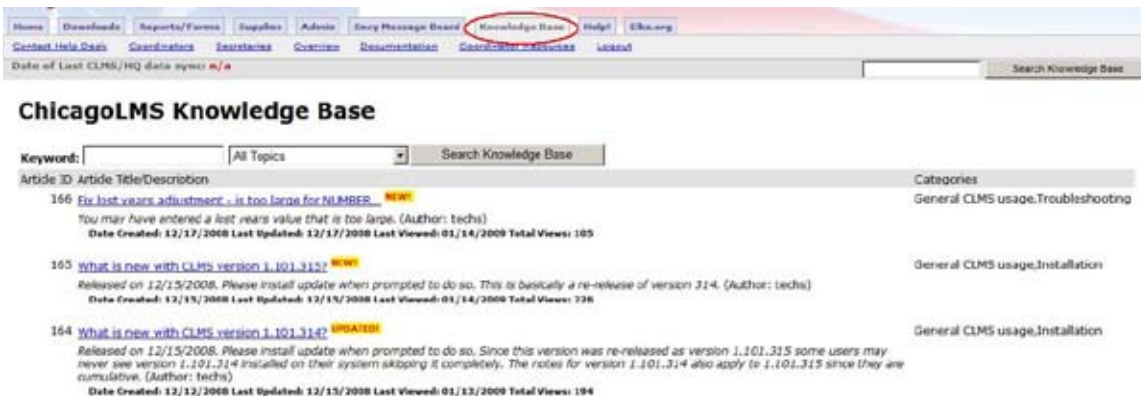
The changes listed on this page (zip code adjustments, etc.) may or may not be reflected in your local CLMS database. If not, please make sure you make the changes *prior* to your next offsite backup.

Chapter Four: CLMS Documentation & Help

The CLMS software package is thoroughly documented in a 400-page manual that can be accessed online in PDF format for easy printing, or in HTML format for easy searching and browsing. To access the manual, click the documentation link from CLMS main menu:



For additional help, visit the CLMS Knowledge Base to access a searchable database of more than 100 technical support articles:



Chapter Five: Grand Lodge Reports

Grand Lodge Annual and Semi-Annual Membership Reports can (and must) be submitted through your CLMS software. Don't worry, it's easy to do!

How do I submit my Annual Membership Report?

For detailed, step-by-step assistance, type the elks.org keyword **Annual Report**, which will take you automatically to the appropriate section of the online CLMS documentation:

www.elks.org/SharedElksOrg/chicagolms/webhelp/html/repgrandlodgeannual.htm

Note that when you push the button to submit your report, CLMS will calculate your membership data and transfer you automatically to the elks.org website. (You'll need to login with your elks.org user name and password.) Review the data to make sure that it's accurate, but remember that certain fields (lines 5, 11, 12, 13 & 27) are calculated automatically, and will not display until you've submitted your report:

Chicago Northshore, IL No. 1316

Section A: Membership Stats for the Lodge Year Ending	
For the lodge year ending:	03/31/2009
Lodge Number:	1316
1. Number of Elks Report on April 1st:	145
2. Number of Elks Initiated:	0
3. Number of Elks affiliated by dimit and certificate of release:	0
4. Number of Elks affiliated by reinstatement:	106
5. Total Number of Elks Added to Roll:	----
6. Number of Elks stricken from roll for non-payment of dues:	0
7. Number of Elks expelled:	0
8. Number of Elks granted transfer dimit:	0
9. Number of Elks granted absolute dimit:	0
10. Number of Elks deceased:	0
11. Total Number of Elks Dropped from Roll:	----
12. Total Number of Elks on Roll:	----
13. Net Membership GAIN or LOSS:	----

Note: Lines 5, 11, 12 & 13 will be calculated automatically upon submission.

Section B: Membership Stats for the Lodge Year Starting	
<i>These pre-members (lines 14, 15a & 15b) not be counted on lodge roll yet.</i>	
14. Number of applications on hand, waiting for investigation:	10
15a. Number of candidates waiting for vote:	0
15b. Number of candidates waiting for initiation:	0
<i>Figures reported on line 12 should include Members listed on lines 16 to 20.</i>	
16. Number of Life Members (excluding Honorary Life Members):	45
17. Number of Honorary Life Members:	0
18. Elks 6 months in arrears as of April 1st	0
19. Elks 1 year in arrears as of April 1st	0
20. Elks 18 months in arrears as of April 1st	251

Section C	
21. Top Membership Recruiter name:	none
Number Recruited:	0
27. Remit followiga dues:	----

Section D: Value of Property of Lodge (Estimated)	
<i>Submit numbers only. Omit dollar signs (\$) and commas, etc. (10000 instead of \$10,000)</i>	
<i>Assets</i>	
28. Value of Real Estate:	<input type="text"/>
29. Value of Building:	<input type="text"/>
30. Value of Furniture and Fixtures:	<input type="text"/>
31. Other invested assets:	<input type="text"/>
32. Cash on hand and in the bank:	<input type="text"/>
33. Revenue due to lodge for dues, etc.:	<input type="text"/>
<i>Liabilities</i>	
34. Loans Outstanding:	<input type="text"/>
35. Mortgage:	<input type="text"/>
36. Bonds to be repaid:	<input type="text"/>
37. Other debts:	<input type="text"/>

Note that Section D data regarding lodge property is not calculated by CLMS, and will need to be supplied manually online. After you've completed this section, you'll be asked to affirm your identity and submit the report to Grand Lodge.

Check the certification box below, and click the "Submit to Grand Lodge" button to save your work and submit your report to Grand Lodge. You will NOT be able to submit further revisions online.

☐ Per Section 12.050(i) of the Grand Lodge Statutes, I certify that I am John J. Smith, and that I am the current lodge secretary of lodge 0010, and that the figures above correctly report the membership of Lodge 0010 for the period ending 03/31/2007. I further attest that I have the approval of the Exalted Ruler to submit this report.

Lodge FEIN Number:

That's all there is to it! After you submit your report the system will display the Per-Capita payment due from Line 27, and the address where you should mail your check.

Can I print of copy of my report after it has been submitted?

Of course. From the Report/Forms tab of the CLMS menu, click the link labeled "GL Reports:"



You'll be taken to the Grand Lodge Reporting area, where you can click the "Annual Reports" link to see a summary of the report you've submitted:

A screenshot of the BPO Elks of the USA Grand Lodge Reports page. The page title is "BPO Elks of the USA Grand Lodge Reports" with the URL "http://www.elks.org/grandlodge/reports". The navigation bar includes links for Grand Lodge Reports, Grand Lodge Directory, ELKS.org Home Page, Logout, Home, Annual Reports, Nov. Reports, CLMS Bar dues Reports, Charitable Reports, and Pending Charitable Reports. The "Annual Reports" link is highlighted with a red circle. Below the navigation bar, the "Annual Report Status" section is displayed. It shows the Report End Date as 3/31/2008, Lodge = 1316, Sequence = LdgNum Records: 1, and Report End Date: 3/31/2008. A table below shows the report details for Lodge 1316, including columns for Date, Start, End, Total, Repay, Exp., Trans., Abs., Died, Total, Net, %, Final, Del., Del%, Life, Res., TotLife, and Life%. The table shows data for the year 2008, with a total of 145 members and a net loss of 13.7.

Click your lodge name for a printer-friendly version of the report, or [PDF] for a version you can save to your hard drive, or email as an attachment. You can even display reports submitted in previous years by selecting the year from the drop down menu at the top of the report.

Do I still need to submit a hard copy to Grand Lodge?

No. Once you've submitted your report online, you do not (and should not) submit a hard copy to Grand Lodge. Your State Sponsor, District Deputy and State Officials can also access the report online, and should no longer require a hard copy submission.

How do I submit my November Membership Report?

The semi-annual (November) membership report must also be submitted through CLMS. The procedure is virtually identical to the Annual Report procedure. For details, type the elks.org keyword **November Report**:

www.elks.org/SharedElksOrg/chicagolms/webhelp/html/repmembership.htm

How do I submit my Annual Charitable Survey?

The Annual Charitable Survey, also know as Page 2 of the Annual Report, can be submitted directly online. In fact, you can track your charitable programs online throughout the year, and then submit your report in April with the simple click of a

Home Downloads Reports/Forms Supplies Admin Secy Message Board Knowledge Base Help Etko.org

Lodge Reports **Charity Report 2008/2009** GL Reports Documentation Coordinator Resources Logout

Date of Last CLMS/HQ data sync: n/a

Search Knowledge Base

1001 - Hoop Shoot ▼ Add New Program

Date (mm/dd/yyyy)	Program (A)	Head Count of Participants (B)	# Elks (C)	# Helpers (D)	Elks Hours (E)	Helpers Hours (F)	Elks Miles (G)	Helpers Miles (H)	Non-Cash (Est. Value) (I)	Cash (J)

Save

2008/2009 Lodge Year										
ProgramID [Click to Edit]	Head Count of Participants (B)	# Elks (C)	# Helpers (D)	Elks Hours (E)	Helpers Hours (F)	Elks Miles (G)	Helpers Miles (H)	Non Cash (Est. Value) (I)	Cash (J)	
1001 - Hoop Shoot	120	8	6	64	36	138	31	200	0	Delete

25

Annual Charitable Survey 2006/2007

To the Grand Lodge, Benevolent and Protective Order of Elks of the United States America

Chicago Northshore, IL No. 1316

ProgramID	Head Count of Participants (B)	# Elks (C)	# Helpers (D)	Elks Hours (E)	Helpers Hours (F)	Elks Miles (G)	Helpers Miles (H)	Non Cash (Est. Value) (I)	Cash (J)
Youth Programs:									
1001 - Hoop Shoot	15	6	0	24	0	90	0	\$495	\$380
1002 - Youth Scholarship	16	3	0	6	0	0	0	\$113	\$0
1099 - Other Youth Programs	10	1	0	3	0	0	0	\$56	\$400
Program Totals:	41	10	0	33	0	90	0	\$664	\$786

Chapter Six: Appointing a Cyber-Assistant

One of the most powerful features of the Elks.org website is the ability to create a "Virtual Home Page" for your local lodge. This option is available automatically as part of your secretary access privileges. Download a copy of our "Virtual Home Page Owners Manual" for more information:

<http://www.elks.org/lodges/VHPOwnersManual.pdf>

Although it's easy to update your own Virtual Home Page, you may prefer to appoint another member to assist you with this responsibility. Such a member is called a Cyber-Assistant, and you can make the appointment online by clicking the "Admin" tab from the main menu:



Click the link labeled "Appoint Cyber-Assistant" and you'll see a list of all the members of your lodge that have an Elks.org user name and password:

Cyber-Assistant Authorization for Lodge Year Ending 03/31/2008

Cyber-Assistants are authorized to update your lodge Virtual Home Page on your behalf, but are not authorized to order lodge supplies, submit membership information, or perform any other secretarial functions online.

To appoint a new Cyber-Assistant, click the "Appoint as Cyber-Assistant" button beside your appointee's name. Your lodge will be invoiced for the \$25 registration fee. Note that this appointment will expire automatically on **03/31/2008**, and a new registration request will be required for next year. You can appoint up to three Cyber-Assistants for your lodge, but a separate \$25 registration fee will apply for each appointment.

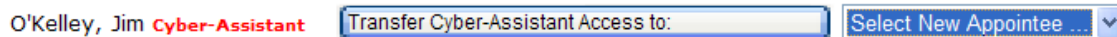
To transfer an existing Cyber-Assistant appointment from one member to another, select the new appointee's name from the drop down box opposite your current Cyber-Assistant. Then click the "Transfer Cyber-Assistant Access" button and the transfer will be effective immediately. There is no charge to transfer a Cyber-Assistant registration from one member to another.

Baker, Joseph	Appoint as Cyber-Assistant & Invoice Lodge \$25
Flores, Richard	Appoint as Cyber-Assistant & Invoice Lodge \$25
Hennings, Robert	Appoint as Cyber-Assistant & Invoice Lodge \$25
Kavan, Dana	Appoint as Cyber-Assistant & Invoice Lodge \$25
Lazar, Eliza	Appoint as Cyber-Assistant & Invoice Lodge \$25
Mantelos, Andrew	Appoint as Cyber-Assistant & Invoice Lodge \$25
Martin, Gloria	Appoint as Cyber-Assistant & Invoice Lodge \$25
Mensch, Frederick	Mismatch, GL Membership number: 0 Elks.org Membership Number: 999999
Morgan, Meghan	Appoint as Cyber-Assistant & Invoice Lodge \$25
Northey, Marcee	Mismatch, GL Membership number: 0 Elks.org Membership Number: 999999
O'Kelley, Jim	Appoint as Cyber-Assistant & Invoice Lodge \$25
O'Reilly, Edward	Appoint as Cyber-Assistant & Invoice Lodge \$25
Ronzani, Paul	Lodge Secretary. (Cyber-Assistant access privileges are included in secretary access rights.)
stewart, donald	Appoint as Cyber-Assistant & Invoice Lodge \$25

To appoint a member as Cyber-Assistant, simply click the button beside their name labeled "Appoint as Cyber-Assistant." Your appointee will be given immediate Cyber-Assistant access privileges, and will be sent an email confirmation message. Your lodge will be invoiced for the \$25 registration fee.

What if I want to change Cyber-Assistants later?

No problem. Once you appoint a Cyber-Assistant, the button beside their name will be displayed like this:



To transfer the appointment to a different member, select the new appointees name from the "Select New Appointee..." drop down box, and then press the "Transfer Cyber-Assistant Access" button. That's all there is to it. The transfer will be effective immediately, and an email confirmation will be sent to your new appointee. There is no charge for a Cyber-Assistant transfer.

Chapter Seven: Validating Online Users

Over time, as members drop from your lodge and new members are added, you may discover that some former members of your lodge have Elks.org accounts even though they're no longer members, or have transferred to a different lodge. Or you may discover that some new members of your lodge have Elks.org accounts even though they haven't yet been added to your membership roster. These situations are easy to remedy by clicking the "Admin" tab:



You'll see a list of any Elks.org members from your lodge that don't have matching lodge and membership numbers in the Grand Lodge database. Click the link next to their name to address their particular situation:

Name	Elks.org Membership #	Last Elks.org Visit		
Chelini, James	999999	01/12/2009	[Remove from Elks.org]	[Correct Elks.org]
Mensch, Frederick	999999	01/12/2009	[Remove from Elks.org]	[Correct Elks.org]
Motto, Michael	999999	01/05/2009	[Remove from Elks.org]	[Correct Elks.org]
Northey, Marcee	999999	01/12/2009	[Remove from Elks.org]	[Correct Elks.org]
Ziko, Dan	999999	01/12/2009	[Remove from Elks.org]	[Correct Elks.org]

Chapter Eight: Ordering Lodge Supplies

Ordering manuals, meeting supplies and lodge supplies is easy through the Grand Lodge website. Click the link labeled "Supplies" tab from CLMS main menu, and then link labeled "Grand Lodge Supplies":



Supplies

Local lodge secretaries can order official supplies, Membership Cards, and mailing labels online:

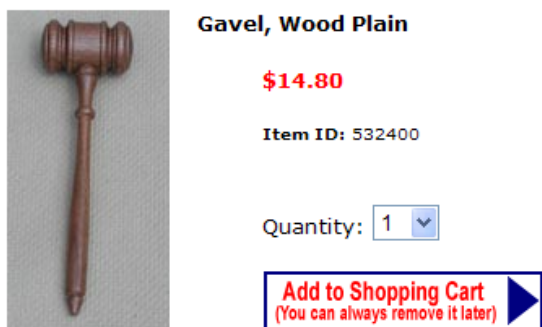
- [Grand Lodge Supplies](#) (circled in red)
- [Membership Cards](#)
- [Lodge Mailing Labels](#)

Note that you must be a duly-elected lodge secretary to access these features.

Products are divided into several categories, or you can search by keyword:



Once you've found the product you need, specify the quantity and click the button labeled "Add to Shopping Cart:"



That's all there is to it. Keep adding items to your cart until you're ready to check out, then click the button labeled "Proceed to Checkout:"

Grand Lodge Supplies

Shopping Cart

Item ID	Item Name	Quantity	Price	Total	
\$32400	Gavel, Wood Plain	1	\$14.00	\$14.00	Remove
\$11900	Subordinate Lodge Officer (5-Book) Leadership Set	1	\$4.25	\$4.25	Remove

Total:	\$19.05
---------------	----------------

[Resume Shopping](#)

[Proceed to Checkout](#)

You'll be asked to confirm your order and supply your billing and shipping address. Be sure follow all prompts – your order won't be complete until you click the "Finalize Order" button.

Grand Lodge Supplies

Your Order

(NOTE: your order is NOT complete until you press the **Finalize Order** button, below.)

[Edit Order Contact Info](#)

Store Name: Grand Lodge Shipping Department

Order ID: 34298 (05/18/2007 3:15 PM) Status: PENDING

(Order has not yet been finalized and has NOT been submitted for processing.)

Frederick Mensch

847-776-0747 (evening)

fredm@elks.org

Lodge Number: 1316

Billing Address:

Chicago Northshore Elks Lodge #1316
Niles IL 60714

Shipping Address

Chicago Northshore Elks Lodge #1316
Niles IL 60714

Ship via: UPS/FedEx Ground (No PO Boxes)

Item ID	Item Name	Quantity	Price	Sub-total	Total
332400	Gavel, Wood Plain	1	\$14.80	\$14.80	\$14.80
311900	Subordinate Lodge Officer (3-Book) Leadership Set	1	\$4.25	\$4.25	\$4.25
				Total:	\$19.05

Total: \$19.05

Tax and shipping, if applicable, will be added to your order separately.

Finalize Order

Note that tax and shipping, if applicable, will be added separately to the total displayed. Your lodge will be invoiced for the total amount due.

Chapter Nine: Secretary-Only Message Board

Even the most experienced lodge secretary has questions occasionally, and the Elks.org Secretaries-only message board is a great place to go for answers:



Submissions to the board are organized into topics:



Click around and explore! If you'd like to add a message to an existing topic, simply scroll down to the bottom of the messages and click the link labeled "Add New Message:"



You'll be presented with a simple online form where you can type your message:

When you're done typing, press the button labeled "Add New Message" and your submission will be added automatically to the current topic. Remember that messages can't be edited or deleted after they're posted, so be sure to check for typos *before* you submit, and be sure to respect the privacy of your members.

If you'd like to start a brand new topic, click the link labeled "Add New Topic" at the bottom of the topic list:

DD PRE-VISIT - FORUM BOX (3 Messages, Most Recent: 10/16/2008, 3:04PM)
 CLMS login (1 Messages, Most Recent: 10/16/2008, 7:53AM)
 November membership report (5 Messages, Most Recent: 10/16/2008, 7:50AM)
 Stickers for membership cards (2 Messages, Most Recent: 10/15/2008, 8:51PM)
[Add New Topic](#) [Search All Messages](#)

Again, you'll be presented with a simple online form. This time you'll also be asked to supply a topic name:

Submit the form and your topic will be added to the message board. Be sure your topic pertains specifically to local Lodge Secretaries. For topics of a more general nature, click the "Forum Menu" link to visit the General Membership Forum:

Lodge Secretary Message Forum

Messages posted since 10/15/2008
[\[Forum Menu\]](#) [\[Go off\]](#)

Logged on as: Frederick Mensch, fredm@elks.org. If you're not Frederick Mensch, please [logout](#).

Topics:

Survey (20 Messages, Most Recent: 01/13/2009, 10:01AM)
 Officer of the Year (3 Messages, Most Recent: 01/13/2009, 9:53AM)

Chapter 10: Contact Us

Still have questions? Comments? The best way to reach us is via email:

Department	Email Address	Regarding:
CLMS Help Desk	clms@elks.org	CLMS technical questions.
Magazine Circulation Dept.	magcirc@elks.org	Membership submissions.
Grand Lodge Shipping Dept.	shipping@elks.org	Supply Orders, Membership Card Orders.
Office of the Grand Secretary	grandlodge@elks.org	Annual Reports, Semi-Annual Reports, Charitable Giving Survey.
Grand Lodge Internet Dept.	webmaster@elks.org	Website technical support.

— APPENDIX —

STATUTORY DUTIES OF LODGE SECRETARY

Section 12.050. The Secretary of the Lodge shall:

- a. Keep accurate minutes of all meetings.
- b. Maintain accounts between the Lodge and its Members.
- c. Assign to each Member a number, which is shown on their membership card.
- d. Receive all monies due the Lodge and pay them over to the Treasurer.
- e. Inform applicants for membership of their acceptance or rejection.
- f. Notify all Committee Appointees.
- g. Prepare the Annual Report to the Grand Lodge.
- h. Prepare a period membership report on forms furnished by the Grand Secretary as of the first day of November of each year. The report is due on or before the fifth day of November.
- i. Report all expulsions and suspensions to the Grand Secretary.
- j. Read and answer all correspondence of the Lodge subject to the approval of the Exalted Ruler.
- k. Give bond of at least \$5,000 or in a greater amount as may be provided in the By-Laws (this is automatic under Property Plus \$50,000 bond).
- l. Present a written report of the transactions of his office to the Lodge at the first session in April and October.
- m. Receive compensation as fixed by the By-Laws.
- n. Perform all duties required by the Subordinate Forum.
- o. Attend all District Deputy Clinics unless excused for good cause.

EXHIBIT B

LODGE SECRETARY WILL HAVE THE SUCCEEDING INFORMATION READY AND LAID OUT FOR DISTRICT DEPUTY VISIT, IN THE FOLLOWING ORDER

Lodge Name and Number _____ Date _____

1. All items on the check sheet, printed on the reverse side, in listed order.
2. Current membership _____, and year-to-date ENF donations \$ _____.
3. Copy of Grand Lodge Area Auditing & Accounting Committee evaluation form.
 - a) Have GL Committee questions or comments been replied to and/or complied with? ☐Yes ☐No
4. Date IRS Form 990/990T mailed _____.
5. Copy of Lodge By-Laws with general revision date. Date _____.
6. Copy of Lodge House Rules with general revision date. Date _____.
7. Salaries: Secretary \$ _____; Treasurer \$ _____; Tiler \$ _____; Organist \$ _____; Vocalist _____.
8. Initiation fee \$ _____; Annual Dues \$ _____; Reinstatement fee \$ _____.
9. Amount of fire insurance \$ _____; date when last adjusted _____.
10. Number of meetings missed by Lodge Officers, to date:
E.R. _____; Leading Knight _____; Loyal Knight _____; Lecturing Knight _____; Secretary _____;
Treasurer _____; Tiler _____; Esquire _____; Chaplain _____; Inner Guard _____; Organist _____;
1 year Trustee _____; 2 year Trustee _____; 3 year Trustee _____; 4 year Trustee _____; 5 year Trustee _____.
11. Is the Lodge incorporated? ☐Yes ☐No Date of incorporation _____.
12. What is current combined indebtedness of Lodge? \$ _____.
13. Current Profit/Loss Statement for each entity (Lodge, Club, Bingo, etc.).
14. Has Exalted Ruler appointed a Presiding Justice? ☐Yes ☐No; a Mediator? ☐Yes ☐No [GLS 13.020]
15. Does Lodge have Ritual coaching and are Lodge Officers able to recite Rituals from memory?
☐Yes ☐No
16. Has Exalted Ruler scheduled an Elks Training Session? ☐Yes ☐No
Will that be done? ☐Yes ☐No
17. Does Lodge Secretary submit written transaction reports to the Lodge at 1st sessions in April and October?
☐Yes ☐No [See Exhibit N]
18. Does Board of Trustees submit written reports to the Lodge at 1st sessions of each month?
☐Yes ☐No
19. Does Lodge have an active P.E.R. Association and does it hold required meetings? ☐Yes ☐No
[GLS 13.190]

Please have P.E.R. Association minutes available for District Deputy! Minutes of this body should be held in the Lodge office and be available at all times. All funds generated or held by a P.E.R. Association, other than P.E.R. Association Dues, belong to the Lodge, may only be used if budgeted and approved by the Lodge, and are subject to audit by the Lodge. [GLS 13.190, Opinion 02]

MEMBERSHIP RECORD

CODE 550500

[illegible]

[APPLICANT]

Check the Committee Preferences from the lists below:

CIVIC/COMMUNITY

___ Americanism
 ___ Blood Drives
 ___ Boy/Girl Scouts
 ___ Charity
 ___ Community Affairs
 ___ Community Welfare
 ___ Drug Awareness
 ___ Elks Hospitals/Clinics
 ___ Essay/Poster Contests
 ___ Handicapped Children
 ___ Law and Order
 ___ Other
 ___ Scholarship
 ___ Summer Camps
 ___ Veterans Services
 ___ Youth Activities
 ___ Youth Sports

LODGE ACTIVITIES

___ Auditing/Financial
 ___ Bingo
 ___ Breakfast/Dinners
 ___ Bridge/Card Clubs
 ___ Building Maintenance
 ___ Bus/Boat Trips
 ___ Charity Fund-Raising
 ___ Conventions
 ___ Decorations
 ___ Entertainment
 ___ Elks National Foundation
 ___ Family Activities
 ___ Games
 ___ Greeter
 ___ Lodge Bulletin
 ___ Lodge Visitation
 ___ Membership
 ___ Other
 ___ Parties/Dances
 ___ Photography
 ___ Public Relations
 ___ State Major Project
 ___ Team Sports
 ___ Visitation of Sick
 I would be interested in serving as an Officer of the Lodge (Yes/No) _____

[PROPOSER]

I understand that standards for becoming a Member of the Order of Elks are high, that membership is attained by invitation only, and is limited to persons of good moral character who believe in God.

In proposing this applicant for membership, I attest that I have known the applicant for _____ (Months/Years), that he/she is morally, socially and financially responsible; and, in my opinion, will become an active Member who supports our beliefs.

In the event that the applicant is approved and accepted, I pledge my personal interest to his/her development and progress in becoming an active Member who exemplifies the principles of the Benevolent and Protective Order of Elks of the United States of America.

(Signature)

(Date)

[APPLICANT]

Provide two references other than the Proposer. All must be Members of the Order.

Name _____ Membership No. _____
 Lodge Name & No. _____
 Home Address _____
 Business Address _____
 Telephone _____ E-mail _____
 Name _____ Membership No. _____
 Lodge Name & No. _____
 Home Address _____
 Business Address _____
 Telephone _____ E-mail _____

List all places of residence and your occupation for the 5 years preceding the date of this application if different from the address and/or occupation given on reverse side.

Place of Residence
 Date (Established/Changed) _____ Telephone _____
 Occupation _____
Place of Residence
 Date (Established/Changed) _____ Telephone _____
 Occupation _____

APPLICATION PROCESSING RECORD**Committee on Membership Recommendation**

The undersigned Committee on Membership reviewed the application of _____ for membership in the BPO Elks USA (Date) _____ and found:
 Favorably: _____ Unfavorably: _____
 Signatures of Committee Members: _____

To be completed by the Lodge Secretary

Result of Ballot by the Lodge: Accepted _____ Rejected _____

Action	Date
Application Received	
Initiation Fee Paid (\$ _____)	
Read on the Lodge Floor	
Balloting on Candidate by Lodge	
Applicant Notified of Result of Balloting	
Indoctrination	
Prorated Dues Paid (\$ _____)	
Initiated	
Membership Number Assigned	
Member Information Entered in CLMS	

Application for Membership



Benevolent and Protective
ORDER OF ELKS
of the United States of America

Elks Care — Elks Share

EXHIBIT D continued

Proposal for Membership

Benevolent and Protective Order of Elks of the United States of America

Proposer

Address _____

E-mail Address _____ Telephone Number _____

_____ is proposed for membership by:
(Legal Name of Applicant)

_____, of Elks Lodge No. _____
(Proposer) (Member #)

(Signature of Proposer)

Applicant

Name _____ Spouse _____

Home Address _____ City _____ State _____ Zip _____
(Plus 4)

E-mail Address _____ Telephone Number _____

Occupation _____ Business Name _____

Business Address _____ City _____ State _____ Zip _____
(Plus 4)

E-mail Address _____ Telephone Number _____



To Be Answered by the Applicant

— PLEASE PRINT OR TYPE —



1. Place and date of Birth City: _____ County: _____
State: _____ Month: _____ Day: _____ Year: _____

2. Do you believe in God? (Yes/No) _____

3. Are you a citizen of the United States of America? (Yes/No) _____
If a citizenship is by virtue of naturalization, your final naturalization papers were issued:
Month: _____ Day: _____ Year: _____ at: _____

4. Are you willing to assume an obligation that:
(a) Does not conflict with your duties to yourself, family, religious or political opinions and
(b) Binds you to uphold the Constitution and laws of the United States of America? (Yes/No) _____

5. Are you a member of, or directly connected, or affiliated with any organization or group advocating or believing in the overthrow of the government of the United States by force? (Yes/No) _____

6. Have you ever been convicted of or pleaded no contest to a felony or crime of moral turpitude? (Yes/No) _____

7. Were you ever discharged from the Armed Services of the United States of America or any of its Allies? (Yes/No) _____
If yes, type of Discharge received: _____

8. Have you ever been proposed for membership in any Elks Lodge? (Yes/No) _____
If yes, Lodge: _____ Date: _____ Result: _____

EXCERPTS FROM LAWS OF THE ORDER

The Lodge Dues are per annum and may be paid semi-annually in advance of April 1st and October 1st of each year or annually in advance on April 1st of each year. An Applicant rejected, must wait six months before reapplying for membership. Rejected Applicants shall have their Initiation Fees returned to them by the Lodge.

Should a Candidate fail, without good cause, to appear for Initiation within four months from the date of the Candidate's election, the Exalted Ruler shall declare the Candidate's right to Initiation (*under such application and ballot*) and also the Candidate's Initiation Fee forfeited.

I understand that this application must be fully completed and accompanied by an initiation fee of \$ _____. I further understand that prorated dues of _____ must be paid at the time of initiation.

(Signature of Applicant)

(Date)

[APPLICANT]

I express a preference to serve on the Committee, or Committees, checked below:

CIVIC/COMMUNITY AFFAIRS

- ☐ Americanism ☐ Drug Awareness
☐ Charities ☐ Community Welfare
☐ Community Affairs ☐ Law and Order
☐ Elks Hospitals ☐ Elks Clinics
☐ Handicapped Children ☐ Summer Camps
☐ Scholarships ☐ Poster Contests
☐ Essay Contests ☐ Blood Drives
☐ Boy/Girl Scouts ☐ Veterans Services
☐ Youth Sports ☐ Other Activities

LOCAL LODGE ACTIVITIES

- ☐ Lodge Entertainment ☐ Lodge Sports
☐ Bridge/Card Clubs ☐ Games
☐ Conventions ☐ Bus/Boat Trips
☐ Lodge Maintenance ☐ Photography
☐ Publicity ☐ Bingo
☐ Bulletin ☐ Sick Visitation
☐ Breakfast-Dinners ☐ Parties-Dances
☐ Decorating ☐ Greeter
☐ Auditing ☐ Membership
☐ Lodge Visitation ☐ Family Activities

[PROPOSER]

I realize that membership in the Elks is attained by invitation only; that the standards for membership are high and limited to persons of good moral character and who believe in God.

In proposing this Candidate for membership, I attest that they are morally, socially and financially responsible; and that, in my estimation, will become an active Member, in support of our beliefs.

I have known the prospective Member for _____ months/years. If Candidate is approved and accepted, I pledge my personal interest to his/her development and progress in the principles of the B.P.O. Elks.

Signature of Proposer _____ Date _____

Address _____

Phone Number _____

INITIATION PROCESSING RECORD

On the Application of _____

Proposer _____

INITIATION FEE AND DUES

\$_____ \$_____ \$_____
 Initiation Fee Prorated Dues Total Amount Due

Record of Funds Received and Dates:

PROCESSING RECORD

Date Application Received: _____

Date Read at Lodge Meeting: _____

Date Investigated: _____

Date Reported to Lodge: _____

Date Notice Mailed to Member: _____

Date Balloted Upon: _____

Elected: _____ Rejected: _____

Date Inducted: _____

Date Initiated: _____

Membership No. Assigned: _____

COMMITTEE ON MEMBERSHIP

The undersigned Committee on Membership

Reports: Favorably _____ Unfavorably _____

EXCERPTS FROM LAWS OF THE ORDER

The Lodge Dues are per annum and may be paid semi-annually in advance of April 1st and October 1st of each year or annually in advance on April 1st of each year. An Applicant rejected, must wait six months before reapplying for membership.

Rejected Applicants shall have their Application Fees returned to them by the Lodge.

No Lodge can receive an Application from any person residing or being in the jurisdiction of another Lodge, except as otherwise provided for in the Statutes.

Should a Candidate fail, without good cause, to appear for Initiation within four months from the date of the Candidate's election, the Exalted Ruler shall declare the Candidate's right to Initiation (*under such application and ballot*) and also the Candidate's proposition fee forfeited.

MEMBERSHIP APPLICATION

*An Invitation to Join the
Benevolent and Protective
Order of Elks of the
United States of America*



The works of the Benevolent and Protective Order of Elks are well known throughout the Country. Organized on February 16, 1868, we are the largest American Benevolent Organization in the United States of America, consisting of American Citizens of the United States and its Territories. The Order of Elks is dedicated to Service to our communities and our Country.

The Order of Elks is a Charitable Order and is dedicated to helping those who are less fortunate and in need.

The Order of Elks is dedicated to the youth of our communities, Veterans Service, furtherance of Americanism and many other Benevolent activities.

Upon attaining membership in our Order, you will become part of a National Organization, with a membership of well over a million American Citizens, from every prominent city of our Country, who are respected Citizens in their communities and are proud to say that they belong to the Benevolent and Protective Order of Elks of the United States of America.

"Elks Care — Elks Share"

Proposal for Membership**Benevolent and Protective Order of Elks of the United States of America**

Elk Member _____
 Under the Obligation of the Order, proposes the following applicant for membership:

 Signature of Proposer Member # _____

 Address of Proposer

 Phone Number of Proposer _____ Email Address of Proposer _____

**QUESTIONS TO BE ANSWERED BY APPLICANT****— PLEASE PRINT OR USE TYPEWRITER —**

1. Name _____ Spouse's Name _____
 Home Address _____ City _____ Zip _____ Phone _____
 Business Name _____ Occupation _____
 Business Address _____ City _____ Zip _____ Phone _____
 Email Address _____
2. State the place and date of your birth. Answer: Born in City of _____
 County of _____ State of _____ on the _____ day of _____ in year _____
3. Do you believe in God? Answer: _____
4. Are you a Citizen of the United States? Answer: _____
5. If foreign born, when and where were final naturalization papers issued? Answer: _____
6. Are you willing to assume an Obligation that:
 (a) Will not conflict with your duties to yourself, or your family, or your religious or political opinions, and that
 (b) Will bind you to uphold the Constitution and laws of the United States of America? Answer: _____
7. Are you now a member of the Communist Party or indirectly connected or affiliated with the Communist Party, or with any organization or group advocating or believing in the overthrow of the government of the United States by force? Answer: _____
8. Have you ever been convicted of a felony or a crime of moral turpitude? Answer: _____
9. If you have ever been discharged from the Armed Services of the United States or any of its Allies, state the character of the discharge received.
 Answer: _____
10. Have you ever been proposed for membership in any Lodge of this Order, if so, where and when and with what result?
 Answer: _____
11. Have you been a bona fide resident within the jurisdiction of this Lodge immediately preceding the date of this application? Answer: _____
12. Give references of at least two Members of this Order, other than the Proposer, stating the name, home address, and business address:

Name	Home Address	Business Address	Phone

13. Give the name of each place of your residence you have had during the last 5 years preceding the date of this application specifying date of each change therein, also the occupation followed by you in each place.

Place of Residence	When Established	When Changed	Occupation	Phone

The above blank must be fully filled out by the Proposer and the Applicant, and be accompanied by an Application Fee \$ _____ or it will not be considered. Balance of Initiation Fee \$ _____, and proportionate (Semi-) Annual Dues up to next April 1st/October 1st (*strike out date not needed*) must both be paid at time of Initiation.

 Date _____ 20 _____ Signature of Applicant _____

EXHIBIT F**APPLICATION FOR AFFILIATION IN**

Benevolent and Protective Order of Elks

of the United States of America

(Please print or use typewriter)

I, the undersigned, under the Obligation of the Order, hereby make application to be Affiliated in this Lodge and State:

1. By Transfer Dimit from _____ Lodge No. _____

2. By Absolute Dimit from _____ Lodge No. _____

3. By Certificate of Release from _____ Lodge No. _____

4. Name _____ Spouse's Name _____ Email _____

Home Address _____ City _____ Zip _____ Phone _____

Business Name _____ Occupation _____

Business Address _____ City _____ Zip _____ Phone _____

5. State the place and date of your birth: Answer: Born in City of _____

County of _____ State of _____ on the _____ day of _____ in year _____.

6. Have you ever been a Member of this Lodge? _____

7. I am advised that I may be affiliated to membership in this Lodge upon payment of the following:

*Affiliation Fee \$ _____

*Semi-Annual Dues \$ _____

Total \$ _____

8. Give references of at least two Members of this Order, stating the name, home address, and business address of each.

Name	Home Address	Business Address	Phone

I hereby state that I have never been convicted of a felony or a misdemeanor involving moral turpitude.

Date _____

Signature of Applicant

*The individual seeking Affiliation shall pay such fee as may be provided by the By-Laws of the Lodge to which Application is made. Said fee for an Applicant on Certificate of Release shall in no case be less than fifteen (15) dollars [Section 14.180, Laws of the Order]. No minimum affiliation fee is established for the holder of a dimit. [Section 14.110, 14.120, Laws of the Order]. (See also "Certificate of Status," [Sections 14.230, 14.250, Laws of the Order]).

Request for Transfer Dimit or Certificate of Release

Benevolent and Protective Order of Elks
of the United States of America
A Fraternal Organization



TO: _____, Secretary

_____ Lodge No. _____

Address: _____

City: _____ State: _____ Zip Code: _____

Dear Lodge Secretary:

I, the undersigned, respectfully request the issuance of

☐ a Transfer Dimit

(In accordance with Section 14.110, Laws of the Order)

OR

☐ a Certificate of Release

(In accordance with Section 14.180, Laws of the Order;
the \$20.00 Certificate of Release fee is enclosed)

Lodge Secretary:

Please insert membership number

to permit me to apply for Affiliation with: _____ Lodge No. _____

Address: _____

City: _____ State: _____ Zip Code: _____

Lodge Secretary, please send this to the Secretary of the above indicated Lodge.

Signature of Member: _____

Member's Name (print): _____

Member's Address: _____

City: _____ State: _____ Zip Code: _____

DATE _____

CLMS — Transfer Dimit

http://www.Elks.Org/ChicagoLMS/

DOE, JOHN 002123

Lodge	Birthplace	Adm-Dim/Rel From
Proposer	Date of Birth	Dim./Rel To Join
Occupation	Proposed	Dropped (non_pay)
Spouse SUSAN	Elected	Suspended From
Home Phone	Indoctrinated	Expelled
DUES PAID TO: / /	Initiated	Reinstated
	Affiliated	Deceased
	Granted-Transfer Dimit	Became Life Mem.
	Granted-Absolute Dimit	Exalted Ruler
	Granted Ctr. of Release	Secretary
ADDRESS	NAME	CODE 5505
425 W. DIVERSEY PRKWY	JOHN DOE	No. 002123
CHICAGO IL 60614-		

TRANSFER DIMIT

LODGE NAME #5555 Lodge

No. 3000

Date 12/22/2008

Member JOHN DOE

002123
Member No.

Upon Member's own application was this day granted a Transfer Dimit:

To apply for membership in

No. Lodge,

OR

To sign a Petition for Dispensation for and join a new Lodge to be instituted in

0003

DENNIS E. SCHROEDER

Secretary

CODE 552200

TRANSFER DIMIT

LODGE NAME #5555

BENEVOLENT AND PROTECTIVE ORDER OF ELKS

Date 12/22/2008

TO ALL ELKS, Greeting:

JOHN DOE 002123
Is a Member in Good Standing of Member No.LODGE NAME #5555 B. P. O. Elks
and all of Member's indebtedness has been paid up-to-date as required by our Laws.

Upon Member's own application, this DIMIT has been granted to this Member that this Member may apply, within thirty days, for membership in

Lodge, No. B. P. O. Elks

OR

That he may sign a petition for dispensation for and join a new Lodge to be instituted in

0003

Should Member fail to affiliate with the last mentioned, Lodge, in accordance with the provision of the Laws of the Order, this Dimit shall be void and membership of the person named shall continue in the Lodge granting this Dimit.

(SEAL)

JOHN JENNINGS

Exalted Ruler

DENNIS E. SCHROEDER

Secretary

DENNIS E. SCHROEDER Secretary

NOTE: Secretary of the Lodge to whom this Dimit is addressed should at once notify the Secretary issuing same of the affiliation or rejection of the Member.

NOTICE OF AFFILIATION
by
TRANSFER DIMIT

Date 12/22/2008

Member JOHN DOE

002123
Member No.

holding Transfer Dimit from

CITY NAME

Lodge

No. 3000

was this day elected

or rejected

by 0003 Lodge

No.

Secretary

NOTE: Upon acceptance or rejection, this form is to be filled out and mailed immediately to the Secretary of the Lodge innuing the Dimit.

CLMS

EXHIBIT I

CLMS — Certificate of Release

<http://www.Elks.Org/ChicagoLMS/>

JOHN DOE

Lodge	Birthplace	Adm-Dim/Rel From
Proposer	Date of Birth 11/26/1965	Dim/Rel To Join
Occupation	Proposed 12/01/2008	Dropped (non_pay) //
Spouse SUSAN	Elected //	Suspended From // to: //
Home Phone	Indoctrinated //	Expelled //
DUES PAID TO: //	Initiated 12/10/2008	Reinstated //
	Affiliated //	Deceased //
	Granted-Transfer Dimit //	Became Life Mem. //
	Granted-Absolute Dimit //	Exalted Ruler
	Granted-Ctf. of Release //	Secretary
		CODE 5505

ADDRESS	NAME	No.
425 W. DIVERSEY PRKWY	JOHN DOE	002123
CHICAGO IL 60614-		

CERTIFICATE OF RELEASE

Under Section 14-180, B.P.O.E. Statutes

LODGE NAME #5555

BENEVOLENT AND PROTECTIVE ORDER OF ELKS

002123

Member No.

TO ALL ELKS, *Greeting:*

This is to certify that JOHN DOE

was a member of LODGE NAME #5555

and on (date) // was dropped from the rolls for non-payment of dues.

This CERTIFICATE OF RELEASE is granted for the purpose of enabling said Member to apply for membership in:

0003 Lodge, No. 12345

(SEAL)

JOHN JENNINGS

Exalted Ruler

DENNIS E. SCHROEDER

Secretary

NOTE: Lodge Secretary is to fill in necessary information requested above.
560800 Rev. 10/2005

CLMS

CLMS — Absolute Dimit

<http://www.Elks.Org/ChicagoLMS/>

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
ABSOLUTE DIMIT
 LODGE NAME #5555

DOE, JOHN 002123

Lodge	Birthplace	Adm-Dim/Rel From
Proposer	Date of Birth 11/26/1965	Dim./Rel To Join
Occupation	Proposed 12/01/2008	Dropped (non_pay) //
Spouse SUSAN	Elected //	Suspended From // to: //
Home Phone	Indoctrinated //	Expelled //
DUES PAID TO: //	Initiated 12/10/2008	Reinstated //
	Affiliated //	Deceased //
	Granted-Transfer Dimit //	Became Life Mem //
	Granted-Absolute Dimit //	Exalted Ruler
	Granted-Cof. of Release //	Secretary
Initiation Fee in this lodge \$ 25.00		CODE 5505

ADDRESS	NAME	No.
425 W. DIVERSEY PKWY CHICAGO IL 60614	JOHN DOE	002123

<p align="center">ABSOLUTE DIMIT LODGE NAME #5555</p> <p>_____ JOHN DOE 002123 Member Name Member No.</p> <p>upon Member's own application was granted an</p> <p align="center">ABSOLUTE DIMIT</p> <p>on _____ (Date)</p> <p>_____ DENNIS E. SCHROEDER Secretary</p> <p align="right">Code 552100</p>	<p align="center">ABSOLUTE DIMIT LODGE NAME #5555 BENEVOLENT AND PROTECTIVE ORDER OF ELKS</p> <p align="right">DATE: 12/22/2008</p> <p>TO ALL ELKS. <i>Greeting:</i></p> <p>_____ JOHN DOE 002123 Member Name Member No.</p> <p>was a Member in Good Standing of _____ LODGE NAME #5555</p> <p>B. P. O. Elks, and all of the Member's indebtedness is paid up to date, as required by our Laws.</p> <p>Upon the Member's own application, this ABSOLUTE DIMIT has been granted to this Member that this Member may resign his membership in this Lodge.</p> <p align="center">(SEAL)</p> <p align="right">_____ JOHN JENNINGS Exalted Ruler</p> <p align="right">_____ DENNIS E. SCHROEDER Secretary</p> <p align="right">CLMS</p>
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[illegible][illegible]

NOTICE OF ELECTION

BENEVOLENT AND PROTECTIVE
ORDER OF ELKS

A FRATERNAL ORGANIZATION

Dear Applicant:

I have the pleasure to inform you that, at the regular session of
 _____ Lodge, No. _____,
 B.P.O. Elks, held on _____,
you were elected to membership.

Please present yourself for the purpose of Indoctrination on the
 date of _____, at _____ p.m.
 Spouses and friends are welcome to attend Indoctrination.

Please present yourself for the purpose of Initiation on the date
 of _____, at _____ p.m.

*Respectfully yours,*_____
Secretary_____
Date

Balance Due Prior to Initiation:

Due on Initiation Fee.....\$ _____

Dues to April 1\$ _____

Dues to October 1\$ _____


Total.....\$ _____

Section 14.030, B.P.O.E. Statutes: If the candidate fails to appear for Initiation, without good
 cause within four months from the date of election, the applicant's right to Initiation shall be
 forfeited, and the Lodge shall not return any portion of the amount deposited.

561100/561200

Samples of Dues Billing Statements

CLMS — 1st Dues Notice

 LODGE NAME #5555
PO BOX 555
CITY NAME, MN 55350-0272

04/02/2009

000233 3
JOHN DOE
425 W. DIVERSEY
CHICAGO, IL 60614-
-60614-

LODGE NAME #5555
PO BOX 555
CITY NAME, MN 55350-0272

Dues Statement April 1, 2009 April 1, 2010

ANNUAL REGULAR MEMBER DUES PAYMENT REQUIRED \$45.00

[CHECK APPLICABLE BOXES]


1. ELKS NATIONAL FOUNDATION	\$10.00 optional <input type="checkbox"/>
2. STATE MAJOR PROJECT	\$10.00 optional <input type="checkbox"/>
3. LODGE SCHOLARSHIP FUND	\$10.00 optional <input type="checkbox"/>

Amount Due: \$45.00

Please return this statement with your payment. Thank you.

donotic1 TOTAL AMOUNT ENCLOSED: _____

CLMS — Delinquent Dues Notice

 LODGE NAME #5555
PO BOX 555
CITY NAME, MN 55350-0272

04/02/2009

000233 3
JOHN DOE
425 W. DIVERSEY
CHICAGO, IL 60614-
-60614-

LODGE NAME #5555
PO BOX 555
CITY NAME, MN 55350-0272

Dues Statement April 1, 2008.0- April 1, 2009

REGULAR MEMBER DUES - APRIL TO APRIL PAYMENT REQUIRED \$45.00

[CHECK APPLICABLE BOXES]

1. ELKS NATIONAL FOUNDATION	\$10.00 optional <input type="checkbox"/>
2. STATE MAJOR PROJECT	\$10.00 optional <input type="checkbox"/>
3. LODGE SCHOLARSHIP FUND	\$10.00 optional <input type="checkbox"/>

Amount Due: \$45.00

Please return this statement with your payment. Thank you.

donotic2 TOTAL AMOUNT ENCLOSED: _____


Code 560900 — Statement of Dues Pad

STATEMENT OF DUES

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
OF THE UNITED STATES OF AMERICA
A Fraternal Organization

DUES TO _____ \$ _____
_____ \$ _____
_____ \$ _____

TOTAL AMOUNT _____ \$ _____

 JOHN DOE
1000 SHADY TREE LANE
SOMEWHEREVILLE, IL 99999

Dues Are Payable in Advance, Annually on April 1st, or Semi-Annually on April 1st as Specified in this Lodge's Current By-Laws.

Annual Dues \$ _____

Are you receiving The Elks Magazine? Yes _____

Is the above address correct? Yes _____

If not correct, PLEASE LIST!


NEW ADDRESS: _____

NAME: _____

MEMBER'S NUMBER: _____

“Dues are not deductible for Federal Income Tax Purposes.”

“In accordance with the Laws of the Order, \$3.50 of the BPO Elks of the USA Annual Membership Dues is for your annual subscription to *The Elks Magazine* and is not deductible.”

 LODGE NAME #5555
PO BOX 555
CITY NAME MN 55350-0272

JOHN DOE
425 W. DIVERSEY PRKWY
CHICAGO IL 60614-1889

CLMS — Remittance Envelopes

LODGE TRANSACTIONS REPORT

[Section 12.050(m)]

Lodge Secretaries: You may copy this page for your use.

Lodge No. _____ Name _____

For six month period starting April 1, 20____ to September 30, 20____

MEMBERSHIP TRANSACTIONS

(Based on yearly Worksheet)

Number of Elks on April 1 _____
 Number Initiated _____
 Number Affiliated by Dimit _____
 Number Reinstated _____
 Lines 2,3,& 4—Total Added _____
 Number stricken for nonpayment _____
 Number Expelled _____
 Transfers Granted _____
 Absolute Dimits Granted _____
 Number Deceased _____
 Lines 6-10 = Total Dropped _____
 Total on Sept. 30 _____
 Lines 1 & 5 minus Line 11 _____

DELINQUENTS

6 months in arrears _____
 1 year in arrears _____
 Over 1 year in arrears _____

DUES

Collected _____
 To be collected _____

PER CAPITA FEES

GL

SL

DISTRICT

Collected _____
 To be collected _____
 Are By-Laws current? Yes ☐ No ☐
 Expiration Date _____

For six month period starting October 1, 20____ to March 31, 20____

MEMBERSHIP TRANSACTIONS

(Based on yearly Worksheet)

Number of Elks on October 1 _____
 Number Initiated _____
 Number Affiliated by Dimit _____
 Number Reinstated _____
 Lines 2,3,& 4—Total Added _____
 Number stricken for nonpayment _____
 Number Expelled _____
 Transfers Granted _____
 Absolute Dimits Granted _____
 Number Deceased _____
 Lines 6-10 = Total Dropped _____
 Total on March 31 _____
 Lines 1 & 5 minus Line 11 _____

DELINQUENTS

6 months in arrears _____
 1 year in arrears _____
 Over 1 year in arrears _____

DUES

Collected _____
 To be collected _____

PER CAPITA FEES

GL

SL

DISTRICT

Collected _____
 To be collected _____
 Are By-Laws current? Yes ☐ No ☐
 Expiration Date _____

PROPER FORMS OF ADDRESS

Always consult your current ***Grand Lodge & State Associations Directory*** for the correct name and address when contacting Grand Lodge personnel.

Members of the Order are not referred to as “Mr.,” and we **never use nicknames nor titles** such as “Dr.”

Samples of correct usage of titles and the word “Honorable” or “Hon.”: All Grand Lodge Officers, such as Grand Exalted Ruler, Grand Esteemed Leading Knight, Grand Secretary, etc., are to be addressed as follows:

Hon. (Name), G. E. R.
B. P. O. Elks
(then 2-line address)

(This however, does not apply to the Grand Chaplain nor to the Administrative Assistant to the Grand Exalted Ruler.)

The Chairman of the **Board of Grand Trustees** is to have the word “Hon.” as follows:

Hon. (Name), Chairman
Board of Grand Trustees
B. P. O. Elks
(then 2-line address)

All remaining members of the Board of Grand Trustees are to have the word “Hon.” as follows:

Hon. (Name), Grand Trustee
B. P. O. Elks
(then 2-line address)

The Chief Justice of the Grand Forum is to have the word “Hon.” as follows:

Hon. (Name), Chief Justice
Grand Forum, B. P. O. Elks
(then 2-line address)

All remaining Justices of the Grand Forum are to have the word “Hon.” as follows:

Hon. (Name), Justice
Grand Forum, B. P. O. Elks
(then 2-line address)

The Chairman of the Committee on Judiciary is addressed with “Hon.” Remaining Judiciary Committee Members are addressed with “Hon.” ***All Committee Chairmen and Members not mentioned are not addressed with “Hon.”***

All P.G.E.R.s are addressed as “Hon.” such as:

Hon. (Name), P.G.E.R.
B. P. O. Elks
(then 2-line address)

Grand Lodge Agency Managers or Directors do not carry “Hon.” before their names. However, they should be addressed using their correct titles such as:

(Name), Executive Director
Elks National Home
(then 2-line address)

All District Deputy Grand Exalted Rulers are to be addressed as follows:

(Name), D. D. G. E. R.
(State) South District
B. P. O. Elks
(then 2-line address)

(*Be sure to indicate the District as above.) District Deputies do not carry the word “Hon.”

All Special Deputy Grand Exalted Rulers are to be addressed as follows:

(Name), S. D. G. E. R.
B. P. O. Elks
(then 2-line address)

Special Deputies do not carry the word “Hon.”

