

Officers' Training Seminar

Lodge's Business Office

Secretary's Duties

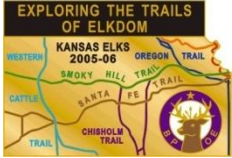
Grand Lodge Website

<http://www.elks.org>



Frank Springer, KEA Secretary, SDGER

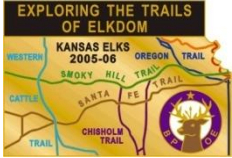
Chanute Lodge No. 806



Welcome Secretaries

I am sure that with your new position, or even as a re-run Secretary, you have questions. I hope to answer a lot of those questions for you today. Before we get started you may want to write down these useful links to resources that you may find helpful. All are can be found at **CLMS2-Web → Support tab**

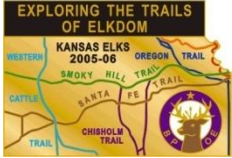
- How do I contact a CLMS Coordinator for my how to questions and from training: <https://www.elks.org/clms2web/reports/clmsCoordinators.cfm>
- The first place to go for how to questions and some training is your Coordinator. You can also visit the Secretary Forum: <https://www.elks.org/clms2web/secyBoard.cfm>
- You may also visit the CLMS2 Knowledge Base where there are articles and videos of how to perform your Secretary tasks: <https://bpoelks.zendesk.com/hc/en-us/categories/200248628-CLMS2-Knowledge-Base->
- What do you do if you cannot get the help you need from the resources listed above? Open a ticket with the Help Desk: <https://www.elks.org/clms2web/help/default.cfm>



A “Good” Secretary

Qualities of a “Good” Secretary...

- Interested in our Order
- Experienced with office work
- Has computer skills
- Detail oriented
- Familiar with the Laws & Procedures of our Order
- Must have time to do the job
 - Requires prompt and almost daily attention
 - Cannot procrastinate



Duties

- p. 2 *Secretary's Manual*
- Also see Appendix-Exhibit A—*Statutory Duties of 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 membership records, including mailing addresses, correct in CLMS2Web.
 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 Workbook or, as now required, directly into CLMS2Web upon completion by Committees involved.
 Inform persons elected to membership of that 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 Local Lodge Forums.
 Any additional duties approved by the Lodge.

CHRONOLOGY OF DUTIES

April:
 Prepare Annual Report and send it 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 30.
 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.

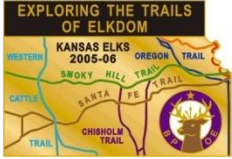
November:
 Prepare Periodic Membership Report. (Sec. 12.050, Stats.)
 *Continue Year-Round Duties.

December:
 Prepare Forum Box with the aid of Trustees. (Sec. 1.210, Stats.)
 *Continue Year-Round Duties.

January:
 Remind Auditing Committee to arrange for Annual Audit.
 *Continue Year-Round Duties.

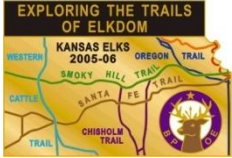
February:
 Prepare Directory Information Forms Packet supplied by Grand Secretary.
 Provide ballots for election (if needed).
 *Continue Year-Round Duties.

March:
 Begin preparing for cut-off of fiscal year in all accounts and records at month's end.
 *Continue Year-Round Duties.



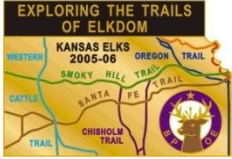
Secretary's Office is the Business office of the Lodge

- Secretary has Custody of Funds & Records
 - Secure office space in the Lodge
 - Keep office & records secure
 - Locked but accessible during regular hours
 - Secretary and Treasurer are bonded
 - \$50,000 through G.L. Property Plus Insurance Program
 - All Lodges have Liability Insurance through the G.L. program



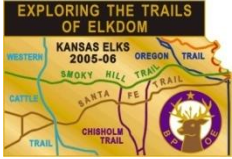
Office Administration

- Use the Lodge's Post Office Box for receipt of mail
 - Pick up the mail daily
 - Act on mail daily. Don't put it off... it gets lost.
- Lodge records must be organized and are open for members' inspection
 - Keep regular office hours



Secretary doesn't need to be an Accountant

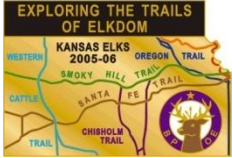
- Lodge may hire a clerical assistant, bookkeeper, and/or accountant
- Many aids available from Grand Lodge
(G.L. knows this is a part-time job)
 - Secretary's Manual
 - Outline of Duties by month (p. 2)
 - Grand Lodge Contacts: phone, fax & email (p. 3)
 - Statutory Secretary Duties – exhibit A (p. 19)



Lodge Financial Records

Auditing & Accounting Manual, Club Management Manual, & Secretary's Manual

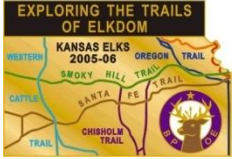
- I suggest Quickbooks software; www.quickbooks.com/Official-Site
 - Easy to use & CLMS will interface with Quickbooks
- Voucher System
 - Basic mechanism for responsible financial disbursements
- Secretary's Cash Book – Exhibit K (p. 31 Secy. Manual)
 - Record all receipts from members and other sources
- Treasurer's Cash Book
 - Record all receipts from Secretary as well as expenditures
- Business aspects peculiar to Elks fraternal structure
 - KEA Business Practices Committee – [Frank Springer, Chr.](#)
- Must use Uniform Chart of Accounts
 - *Auditing & Accounting Manual (Exhibit A – page 27)*



www.elks.org



- Virtual Home Page on [elks.org](http://www.elks.org) website
 - Easy to use – post news, pictures, dates, etc. without special technical expertise
- May also register a [*Cyber Assistant*](#) for VHP
- May register [*Staffers*](#) in CLMS2
 - Can set “Read Only” or “Read & Write” access for Staffers for the CLMS membership database

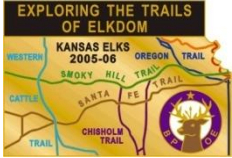


www.elks.org



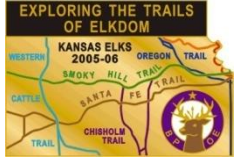
Comprehensive Resource Center

- Elks News and Events
- Who We Are
 - History, 150th Anniversary, Video Library, Membership Inquiry, Elks Magazine, etc.
- Elks Programs
 - *Scholarships, KETCH, Hoop Shoot, Soccer Shoot, other Youth Activities, DAP, Veterans Service Commission, Antlers, etc.*
- Elks National Foundation
- Members Only Section
 - Directory, Membership Toolkit, Message Boards, Extended Access, National Convention, etc.
- CLMS Resource Tabs
 - CLMS Home Tab
 - Secretary News & ENF Hotline
 - GL Manuals & Supplies
 - Download CLMS-PC for Windows
 - CLMS-PC Online
 - CLMS Reports Tab
 - Membership, Charitable, CLMS Status, ENF, & Other
 - CLMS Settings Tab
 - CLMS Accounting Tab
 - Dues & Fees reports
 - Export to other software programs
 - CLMS Messaging Tab
 - CLMS Support Tab
 - Knowledge base, Forum, State Coordinator, Help Desk, Teamviewer



Other Aids Available

- KS Elks Web Site – www.kselks.org 
- CLMS Coordinators – Frank Springer or Brenda King
- DDGER
- SDGER
- KEA Committees
 - Business Practices
 - Insurance & Risk Management
 - Auditing & Accounting
 - Judiciary

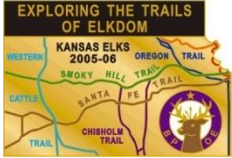


Kansas Elks Web Site

www.kselks.org



- KEA News, District News, Upcoming Events
- Elks Programs & KEA Committee News
- KEA By-Laws & appendices
 - KEA History information
- *Sunflower* on-line; (official KEA publication)
- Directory (officers, committees, lodges)
- Kansas Lodges – information & maps
- Links to other Elk web sites ([KETCH](#) & others)



DDGER Visit

- Checklist of information and materials the DD needs to record and view
(*exhibit B, p. 20, Secretary's Manual*)
- Manuals available in PDF format at elks.org

EXHIBIT B

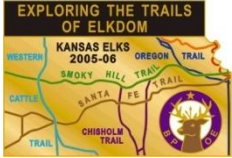
LODGE SECRETARY WILL HAVE THE SUCCEEDING INFORMATION READY AND LAID OUT FOR DISTRICT DEPUTY VISIT, IN THE FOLLOWING ORDER

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:

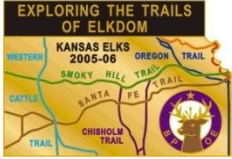
E.R. _____; Leading Knight _____; Loyal Knight _____; Lecturing Knight _____; Secretary _____; Treasurer _____; Tiler _____; Esquire _____; Chaplain _____; Inner Guard _____; Organist _____; 1 year Trustee _____; 2 year Trustee _____; 3 year Trustee _____; 4 year Trustee _____; 5 year Trustee _____.
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]



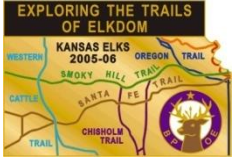
Federal & State Taxes

- Elks Lodges are exempt from federal income tax under Section 501(c)(8) of the Internal Revenue Code.
 - The IRS has no objection to us promoting greater use of our facilities by members and bona fide guests, but has serious objections to soliciting public business.
- Elks Lodges are liable for...
 - Employee taxes – both federal & state (withholding, Soc. Sec., Medicare, FUTA, & SUI)
 - Sales Tax, Liquor Tax, and other excise taxes



Federal Income Tax Exempt Sec. 501(c)(8) I.R. code

- Closed Door Policy protects this exemption; visitor register must be maintained. *(see p. 6 Secretary's Manual)*
- File 990 information return promptly
 - Due August 15th
 - Up to \$5,000/year failure to file penalty and/or loss of tax exempt status
- Keep Charitable Records Up-To-Date and Complete

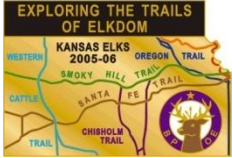


Tax Reporting



- Sales Tax (due 25th each month)
- Liquor Tax (due 25th each month)
- Liquor License
- Payroll Tax (varies – semi-weekly, monthly or qtrly)
 - www.irs.gov/formspubs
 - www.payroll-taxes.com (3rd party tax information library)
- Unemployment Tax (due qtrly)
 - www.dol.ks.gov
- IRS 990 Annual Return (due August 15th)

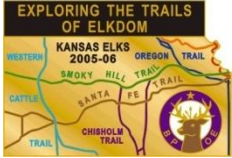
www.ksrevenue.org



Lodge Minutes – Accurate, Full & Complete

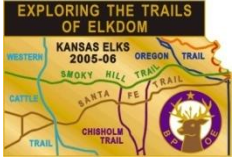


- Knowledge of Lodge's condition & activities is vital to members' interest & participation
- Well kept minutes provide a future reference when information is needed
- May use any type of minute book
 - Minute templates are available at www.elks.org/clms2web/minutes.cfm
 - Taping meetings is allowed. Transcribe the tape then erase it.



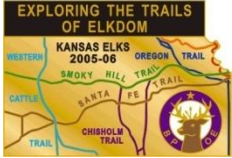
Lodge Correspondence

- CLMS directory information to Grand Lodge - **IMPORTANT**
 - Directory information worksheet packet after February elections
 - Names & mailing addresses for ER and Secretary – update in CLMS
 - Committee Chairpersons – update in CLMS
 - Lodge information – update in CLMS
 - PER information – update in CLMS
 - Obituary notice to Elks Magazine for any PDDGER or higher GL office
- GER Awards & GL Contests
 - These recruiters have earned our gratitude & praise.
 - GER Award Pin worksheet – CLMS-Web → Reports → GER Award Pin Worksheet
- Membership Inquiries from GL website www.elks.org
 - CLMS Alert
 - Respond to all inquiries within 7 days



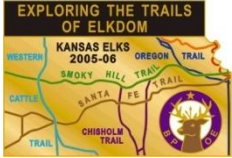
Annual & Mid-Year Membership Reports

- 2 GL Membership reports filed through CLMS
 - Filed automatically for you in CLMS
 - Mid-year Membership Report – data at close of 10/31
 - Annual Report – data at close of 3/31
 - Page 1 – membership data is filed automatically
 - Page 2 – Charitable Statistics is filed separately
 - Be sure CLMS membership data is current before filing dates
- Dues are payable in advance. There is no grace period.



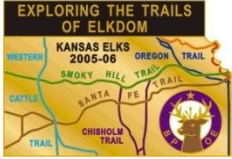
Defining Delinquents

Dues not paid by April 1 st	6-months delinquent (Send monthly statements. You may publish names in bulletin.)
Dues not paid by October 1 st	12-months delinquent (Statute Sec. 14.160: You may Drop for Non-Payment.)
Dues not paid by <u>next</u> April 1 st	18-months delinquent (Don't let this happen!)



CLMS & Membership Records

- Complete record of every Elk that was ever on the roll of your Lodge
 - CLMS keeps an Active file
 - CLMS keeps an Inactive file from the data you started with or added (CLMS implemented in 2009)
- Keep a manual Inactive file (alphabetical order)
 - Should go back to the beginning of time
 - Permanent membership records; old member ledger cards
 - No Grand Lodge Officer or Agency has these records that predate CLMS (2009)



CLMS Membership Ledger

CLMS2Web - Google Chrome
Secure | https://www.elks.org/clms2web/rosterRecord.cfm?frankid=3586271

< Previous Page Refresh Print Close Window

Lodge: 0806 Details ID: 3586271 Data: [membership1]

Frank Springer
Flag this Record [Member, #004089]

- Wizarding Menu -
[Choose a Wizard] Go

Contact ALT Info Spouse History Roles Committees Auxiliaries Misc Payments Custom Remarks Flags Secy Contact Info

Name & Active Address: Help

Lodge/Member No.: 0806 004089
Dues Paid Thru: 04/01/2019 Age: 63 Initiated: 09/19/1991 Member Years: 28 Lost Years: 0
Prefix: [v]
Name: Frank Springer Suffix: [v] Male Female
Nickname: [v] Elks Titles: SDGER PSP PDDGER PER POY PEY
Address (1 of 2): 923 S Highland Ave
Address (2 of 2): [v]
City, State, Zip: Chanute KS 66720-3018 Country: [v]
Carrier Route: C003 DPC: 232 LOT: A0231 RESULT: 000
Mail: Undeliverable Send No Mail Send Newsletter via BOTH Postal Mail & Email
Home Phone: [v] Extension: [v]
Work Phone: [v] Extension: [v]
Cell Phone: 620 431-8577 FAX Phone: [v]
Email: frank@frankspringer.com Elks.org Account: frank@frankspringer.com

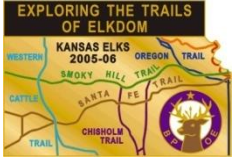
Delete Submit

Last updated: 02/23/2018 09:56 AM [200001] CASS Update: 09/16/2016 Type: M (A) App. Status: I Member Num: 004089 Last Status: INIT (09/19/1991)

Fill it out completely

- Name
- Address, phone, email, etc.
- Birthday
- Alt Info – alternate address
- Spouse information
- History – Elks Milestone Dates
- Roles—Offices, honors, veteran etc.
- Committees
- Misc—Place of birth, occupation
- Custom (define in Settings)
- Remarks (your notes)
- Flags (freeform bookmarks)

■ **Keep a separate log book of membership numbers in numerical order**

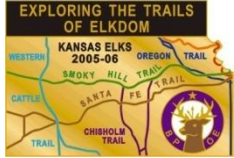


Proposer's Duties

- Explain to candidate what membership involves
- Explain to candidate if application is incomplete or invalid
- Explain to candidate the steps in application processing
- Encourage candidate to...
 - Come to Orientation with family members. Proposer should be there too!
 - Come to Initiation when scheduled. Proposer should be there too!


§14.020: ANY ELK may propose a qualified person for membership in ANY LODGE.

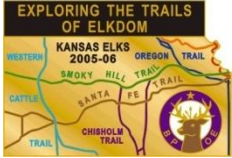
If the person is proposed by a Member of the Order not a Member of the Lodge to which the application is submitted, a certification from the Secretary of the Lodge of the proposer must accompany the application certifying that the proposer is a Member in good standing of the Order.



Application Processing

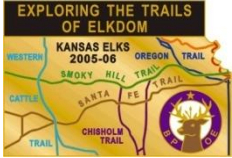
New Member Application – Set up 3 Files

<h3>NEW Application</h3>	<ul style="list-style-type: none"> <input type="checkbox"/> Application received with proper fee <input type="checkbox"/> Reviewed for complete entry & signatures <input type="checkbox"/> Add to Candidate Notice on bulletin board <input type="checkbox"/> Make copies for Investigating Committee <input type="checkbox"/> Keep original application <input type="checkbox"/> Secretary reads at Lodge Meeting (Meeting #1) 	 <p>Microsoft Excel Worksheet</p>
<h3>Investigating Comm. & Balloting</h3>	<ul style="list-style-type: none"> <input type="checkbox"/> Report by Investigating Committee (Meeting #2) <input type="checkbox"/> Record Inv. Comm. Findings on original application <input type="checkbox"/> Ballot (Meeting #2) <input type="checkbox"/> Elected or Rejected – Notify (Exhibit L p. 32 & CLMS-PC) 	
<h3>Ready for Initiation</h3>	<ul style="list-style-type: none"> <input type="checkbox"/> Orientation / Indoctrination <input type="checkbox"/> Initiated – Member No. Assigned – Card Issued (Meeting #2 or 3) 	



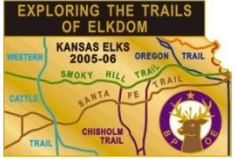
Application Processing

- If a candidate is elected...
 - Give them notice and copies of Constitution & Statutes, Lodge By-Laws, & *What It Means To Be An Elk*
- If a candidate is rejected...
 - Send letter advising the application has not been favorably acted upon
 - Do not comment or attempt to offer any explanation for the unfavorable ballot
 - Do not advise that re-application may be made in six months
 - Send copy of letter to the proposer
 - Return the fees paid to rejected candidate
 - Keep the application or record of it in "dead file"



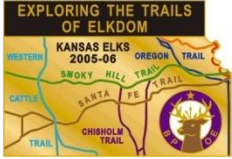
Reinstatement Processing

- Reinstatement Application with Fee
- Locate membership info (Inactive File)
 - No Record Found – Alternatives
 - Old membership card
 - Lodge minutes
 - Elks National Foundation record
 - Affidavit from 2 Elks
 - Initiate as a new member
- Read – Inv. Comm. Report & Ballot



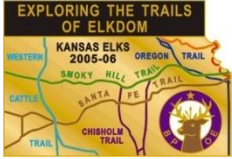
Request for Transfer Dimit or Certificate of Release (exhibit G – p. 27)

- Process PROMPTLY! No Lodge action necessary.
- If a Member in good standing
 - Grant Transfer Dimit immediately (exhibit H – p. 28)
 - Do not drop from role until notified of affiliation in new Lodge
- If a Member was dropped for non-payment
 - They pay a \$20 fee to original lodge
 - Original lodge issues Cert. of Release (exhibit I – p. 29)
 - Mandatory to grant but may make recommendation to the affiliating Lodge



Application for Affiliation (exhibit F – p. 26)

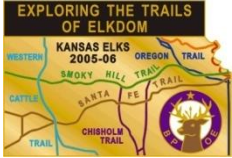
- By Transfer Demit – current member
- By Certificate of Status – unaffiliated
- By Certificate of Release – dropped member
- Processed same as Reinstatement
 - Read at Lodge Meeting
 - Investigated by committee
 - Balloted - Elected
- Assign new membership number
- Notify old Lodge of affiliation



Absolute Dimits

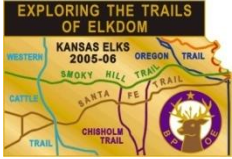
(exhibit J – p. 30)

- **Granting Lodge (§ 14.110)**
 - Must be member in good standing
 - Granted upon written request with membership; card attached
 - Does not require Lodge action
- **Affiliating Lodge (§ 14.120)**
 - Notify granting Lodge 30 days prior to balloting
 - Process as Application for Affiliation



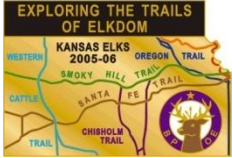
Member says "I Quit!"

- Sometimes, in the heat of a disagreement, a Member may tear up his card and say that he "quits."
- Despite this dramatic gesture, The Secretary must...
 - Keep the Member on the Lodge rolls unless he submits a written and signed request for the Absolute Dimit or is dropped for non-payment of dues.
- Also, after tempers have cooled, the Member must be issued a replacement card should he request one as long as dues are still current.



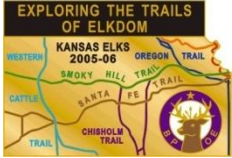
Dues & Lapsation

- Work with active Lapsation Committee
- Year-round work – bill Delinquents monthly
- Mail Dues Notices in advance
 - First Notice – February 15th
 - Second Notice – March 15th
 - Delinquent Notice – April 1st then monthly until paid or dropped
 - May publish delinquents' names in bulletin



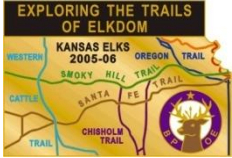
Membership Cards

- Order early from Grand Lodge
 - Order Form supplied from Grand Secretary in September
 - On-line orders...
www.elks.org/Shopping/MembershipCards/default.cfm
- No paid to date beyond life of card
 - Different color each lodge year
- Emboss cards with Lodge's seal
- Destroy old card stock



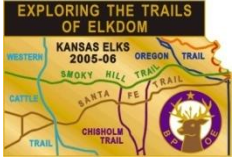
Life & Honorary Life Members

- Pays Grand Lodge per capita dues, insurance & any assessments; \$17.00
- Pays State Association dues; \$3.50
- Pays Lodge administration fee
 - Optional in Lodge's By-Laws
 - Not less than \$5 nor more than ½ the regular Lodge dues
- All dues and fees are subject to sales tax in Kansas



Identification Cards

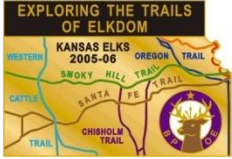
- Issued on request at no charge (§14.140)
 - Spouse of Lodge Member
 - Member's Children or Stepchildren under age 21
 - Family of deceased Member
 - Unmarried widow or widower
 - Children or stepchildren under age 21
 - Associate Member – approved by House Committee
- Privileges may be restricted by house rules or by-laws
 - Can not restrict entering lodge
 - May restrict purchase of goods or services



Life Memberships

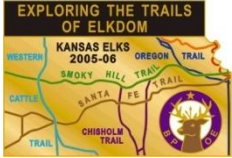
(§ 14.260 & Lodge's By-Laws)

- Not granted automatically
 - Written request formally presented to the Lodge
- Request Published with date of ballot
- Secret ballot for each applicant
 - Requires two-thirds affirmative vote of members present
- Special card issuance & reduced dues do not become effective until April 1st of the succeeding Lodge year
- Laws provide for transfer of Life Membership
- Honorary Life Membership cannot be transferred



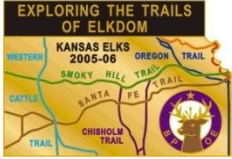
By-Laws Revision

- General Revision due every 5 years
- Work with By-Laws committee
 - Staff assignment in CLMS for ER's appointed By-Laws Coordinator
- Appointed Coordinator uses By-Laws revision interface www.elks.org/grandlodge/bylaws/
- By-Laws on line in PDF format for all members' review or printing www.elks.org/members/



Elections – Annual & Special

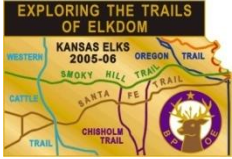
- Study §3.080, 3.090, and 12.150
- Annual Election
 - Nominations – 1st meeting in February
 - Elections – 2nd meeting in February
- Laws permit a candidate to campaign for Lodge Office but not “by any public method or appeal”
 - You are not permitted to provide membership lists or addresses to any Members for any purpose including campaigning.



Lodge Bulletin – Editor - Publisher

- Most knowledgeable on Lodge activities
- Get other officers' & members' input
- Set advance deadlines
- Include...
 - Calendar of events
 - Summary of minutes & member processing
 - Keep members informed of Lodge's charitable & community activities

**A good, informative Bulletin creates
desire to continue membership!**



Bulletin Material – Make it Interesting

- Members Only → Extended Access → Newsletter Editors Resources
www.elks.org/resources/newsletter/
- GL Public Relations Committee
www.elks.org/grandlodge/pr/
- KETCH www.ketch.org
- KS Elks Assoc. www.kselks.org
- Pictures
- Humor
- History
- Add to Bulletin mailing list...

GER

Grand Sec.

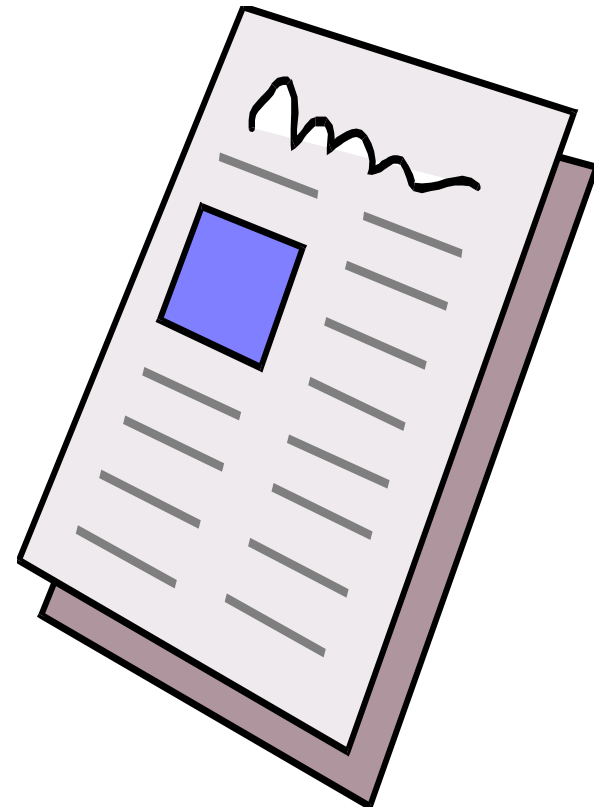
PGER-Sponsor

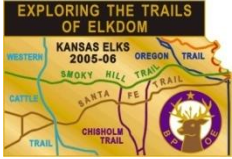
SDGER

DDGER

KEA Officers

Sunflower editor





Lodge Transactions Report

(exhibit N – p. 34) §12.050(m)

At the first Lodge meeting in April and October, the Lodge Secretary is to detail membership figures from the previous six-month reporting period.

- CLMS → Roster → Full Membership Stats
Gives you the information for the Membership Transactions & Delinquents section
- CLMS → Accounting → Transaction Recap
Gives you the information for the Dues & Per Capita Fees section

EXHIBIT N

LODGE TRANSACTIONS REPORT
[Section 12.050(m)]
Lodge Secretaries: You may copy this page for your use.

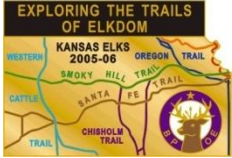
Lodge No. _____ Name _____

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

<u>MEMBERSHIP TRANSACTIONS</u> <small>(Based on yearly Worksheet)</small>	<u>DELINQUENTS</u>		
Number of Elks on April 1	6 months in arrears	_____	_____
Number Initiated	1 year in arrears	_____	_____
Number Affiliated by Dimit	Over 1 year in arrears	_____	_____
Number Reinstated			
Lines 2,3,& 4—Total Added	<u>DUES</u>		
Number stricken for nonpayment	Collected	_____	_____
Number Expelled	To be collected	_____	_____
Transfers Granted			
Absolute Dimits Granted	<u>PER CAPITA FEES</u>	<u>GL</u>	<u>SL</u> <u>DISTRICT</u>
Number Deceased	Collected	_____	_____
Lines 6-10 = Total Dropped	To be collected	_____	_____
Total on Sept. 30	Are By-Laws current?	Yes <input type="radio"/>	No <input type="radio"/>
Lines 1 & 5 minus Line 11	Expiration Date	_____	_____

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

<u>MEMBERSHIP TRANSACTIONS</u> <small>(Based on yearly Worksheet)</small>	<u>DELINQUENTS</u>		
Number of Elks on October 1	6 months in arrears	_____	_____
Number Initiated	1 year in arrears	_____	_____
Number Affiliated by Dimit	Over 1 year in arrears	_____	_____
Number Reinstated			
Lines 2,3,& 4—Total Added	<u>DUES</u>		
Number stricken for nonpayment	Collected	_____	_____
Number Expelled	To be collected	_____	_____
Transfers Granted			
Absolute Dimits Granted	<u>PER CAPITA FEES</u>	<u>GL</u>	<u>SL</u> <u>DISTRICT</u>
Number Deceased	Collected	_____	_____
Lines 6-10 = Total Dropped	To be collected	_____	_____
Total on March 31	Are By-Laws current?	Yes <input type="radio"/>	No <input type="radio"/>
Lines 1 & 5 minus Line 11	Expiration Date	_____	_____



Questions & Answers

CLMS Coordinators in Kansas

Frank Springer
923 S. Highland
Chanute, KS 66720-3018

620-431-8577 (cell)

frank@frankspringer.com

Brenda King
8900 Rolling Hills Circle
Milford, KS 66514-8900

785-761-7216 (cell)

brenda.king@bnsf.com