

Leadership Training Seminar

Secretary's Duties & Lodge Business Office

Grand Lodge Website

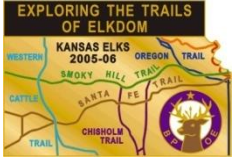
<http://www.elks.org>



Frank Springer, Past Grand Inner Guard

SDGER & KEA Secretary

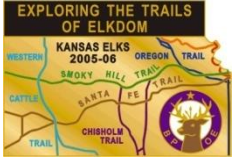
Chanute Lodge No. 806



What makes 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 daily attention
 - Cannot procrastinate



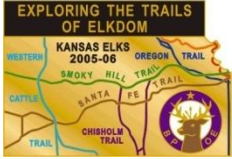
Duties

- Exhibit A p.17:
§12.050
Secretary's
*Statutory
Duties*
- Also see p. 2
of *Secretary's
Manual*

STATUTORY DUTIES OF LODGE SECRETARY

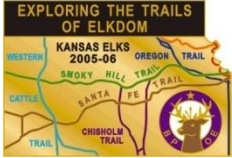
Section 12.050. The Secretary of the Lodge shall:

- 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. Report all expulsions and suspensions to the Grand Secretary.
- i. Read and answer all correspondence of the Lodge subject to the approval of the Exalted Ruler.
- j. 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).
- k. Present a written report of the transactions of his office to the Lodge at the first session in April and October.
- l. Receive compensation as fixed by the By-Laws.
- m. Perform all duties required by the Local Lodge Forum.
- n. Attend all District Deputy Clinics unless excused for good cause.
- p. Collect all records, materials, other information and personal property of the Lodge as described in Section 12.180.



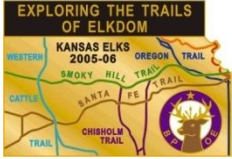
Secretary's Office is the Business office of the Lodge

- Secretary has Custody of Funds & Records
 - Secure office space in the Lodge
 - Keep office & records secure
 - Locked but accessible during regular office hours
 - Secretary and Treasurer are bonded
 - \$50,000 through GL General Liability Insurance Program



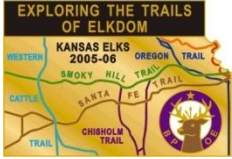
Office Administration

- 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



You don't need to be an Accountant

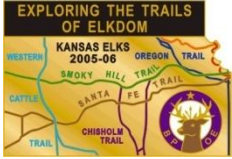
- Lodge may hire a clerical assistant, bookkeeper, and/or accountant
- Aids available from Grand Lodge
(G.L. knows this is a part-time job)
 - Secretary's Manual
 - Auditing & Accounting Manual
 - Financial Reporting System website
 - <https://www.elks.org/grandlodge/auditing/FinancialReporting.cfm>



Lodge Financial Records

Auditing & Accounting Manual, Secretary's Manual, & House Committee Manual

- I suggest **Quickbooks** software; www.quickbooks.com/Official-Site
 - Easy to use... CLMS & FRS will interface with Quickbooks
- Alternative - Manual Voucher System
 - Basic mechanism for responsible financial disbursements
 - Secretary's & Treasurer's Cash Book – Exhibit K (p. 29 Sec. Manual)
 - Secretary - Record all receipts from members and other sources
 - Treasurer - Record all receipts from Secretary as well as expenditures
- Must use GL Uniform Chart of Accounts
 - <https://www.elks.org/grandlodge/manuals/> (Auditing & Accounting Manual)
- Business aspects peculiar to Elks fraternal structure
 - Auditing & Accounting Manual
 - KEA Business Practices Committee – [Frank Springer, Chr.](#)



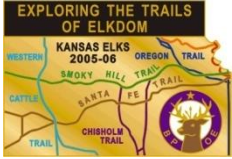
www.elks.org



Comprehensive Resource Center

- Elks News and Events
- Who We Are
 - History, 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.

Intro section break → next section CLMS

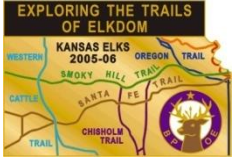


CLMS2-Web



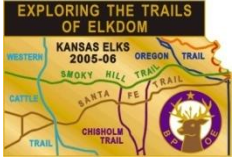
Comprehensive Membership Center

Home	Secretary News, ENF Hotline, GL Manuals, GL Supplies & Forms, Download CLMS2-PC for Windows, CLMS2-PC Online, Meeting Minute templates
Roster	Control Panel, add & process Candidates, Incoming Transfers, Online Submissions
Reports	Membership reports, Charitable reports, CLMS Status reports, ENF reports, Other reports, link to GL Reports
Settings	Lodge Info, Dues, Mailing bar codes, Email settings, Other settings, Custom settings, status dates, Billing Renewal Program (OSG)
Officers/Committees/Auxiliaries	Edit Lodge Officers, Committees, & Auxiliaries Confirm lists with Grand Lodge
Accounting	Export payments to other software, transaction recap, edit rates (dues & fees)
Options	Enable EXPERT mode & enable DEMO mode
Staff	Appoint Staffers, Cyber Assistant, ENF Grants Coordinator, By-Laws Coordinator, Hoop Shoot Coordinator, Charitable Report Coordinator, MVS Coordinator & validate elks.org users
Messaging	Send and received messages - GL and other Lodges
Support	CLMS Help Desk, Secretary Forum, Knowledgebase, download TeamViewer



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 Lodge's Charter date
 - Permanent membership records; old member ledger cards
 - No Grand Lodge Officer or Agency has these records that predate CLMS (2009)



CLMS Membership Ledger

< Previous Page Refresh Print Close Window

Lodge: 0806 Details ID: 3586193 Data: [membership1]

Herbert E Matlock Jr - Wizarding Menu -
[Choose a Wizard] Go

[Flag this Record](#) [Member, #003495]

Contact **ALT Info** Spouse/Emergency History Roles Committees Auxiliaries Misc Payments Custom Remarks Flags

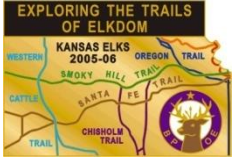
Name & Active Address: Help

Lodge/Member No.: 0806 003495
Dues Paid Thru: 04/01/2020 Age: 78 Initiated: 10/18/1973 Member Years: 47 Lost Years: 0
Prefix:
Name: Herbert E Matlock Suffix: Jr Male Female
Nickname: Elks Titles: PSP PDDGER PER PEY
Street Address: 18525 Eastside Dr
Apt./Suite:
City, State, Zip: Erie KS 66733-4143 Country:
Carrier Route: R001 DPC: 256 LOT: A0118 RESULT: 000
Mail: Undeliverable Send No Mail
Home Phone: 620 754-3606 Extension:
Work Phone: 620 212-2174 Extension:
Cell Phone: FAX Phone:
Email: skbmatlock@ckt.net Elks.org Account: n/a
eNotices OK: Yes, send notices via Email No, do NOT send email.
Newsletter: Send Newsletter via BOTH Postal Mail & Email
Delete Submit

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 (defined in Settings)
- Remarks (your notes)
- Flags (freeform bookmarks)

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

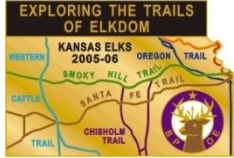


Applications Proposer's Duties

- 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.

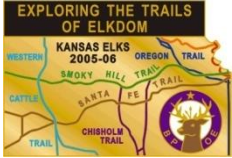
If the person is proposed by a Member of the Order not a Member of the Lodge to which the application is submitted, a certification from the Secretary of the Lodge of the proposer must accompany the application certifying that the proposer is a Member in good standing of the Order.



Application Processing

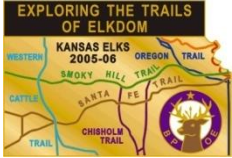
New Member Application – Set up 3 Files

<p style="text-align: center;">NEW Application Exhibit C p. 19-20</p>	<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) <div style="text-align: right;">  <p>Microsoft Excel Worksheet</p> </div>
<p style="text-align: center;">Investigating Comm. & Balloting</p>	<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 J p. 28 & CLMS-PC)
<p style="text-align: center;">Ready for Initiation</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Orientation / Indoctrination <input type="checkbox"/> Initiated – Member Number Assigned – Card Issued (Meeting #2 or #3)



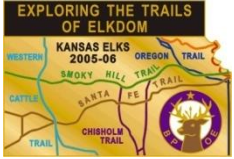
Application Processing

- 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 was declined"
 - Do not comment or attempt to offer any explanation for the unfavorable ballot
 - Do not advise that re-application may be made in 6 months
 - Send copy of letter to the proposer
 - Return any fees paid to the rejected candidate
 - Keep the application or record of it in "dead file"



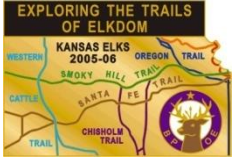
Reinstatement Processing

- Reinstatement Application with Fee
 - Exhibit D p. 21-22
- 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 (process in CLMS)

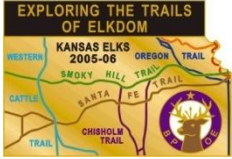
- Process PROMPTLY! No Lodge action necessary.
- If a Member in good standing
 - Grant Transfer dimit immediately ([exhibit G – p. 25](#))
 - Do not drop from role until notified of affiliation in new Lodge
- If a Member was dropped for non-payment
 - They pay a \$20 fee to original lodge
 - Original lodge issues Cert. of Release ([exhibit H – p. 26](#))
 - Mandatory to grant but may make recommendation to the affiliating Lodge



Application for Affiliation

(exhibit E – p. 23)

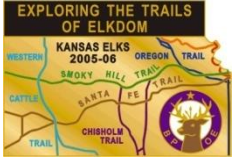
- By Certificate of Status – unaffiliated (from Grand Sec. office)
- By Certificate of Release – dropped member (from old Lodge)
- By Transfer dimit – current member (from current Lodge)
- Processed same as Reinstatement
 - Read at Lodge Meeting
 - Investigated by committee
 - Balloted - Elected
- Assign new membership number
- Notify old Lodge of affiliation



Absolute Dimits

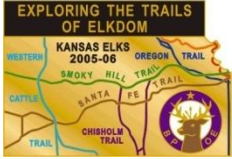
(exhibit I – p. 27)

- **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!"

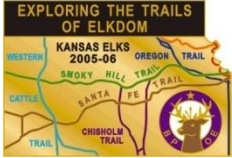
- Sometimes, in the heat of a disagreement, a Member may tear up his card and say that he "quits."
- Despite this dramatic gesture, The Secretary must...
 - Keep the Member on the Lodge rolls unless he submits a written and signed request for the Absolute Dimit or is dropped for non-payment of dues.
- 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

* utilize the **GL Billing Renewal Program (OSG)**

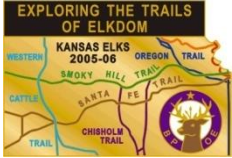
- Work with active Lapsation Committee
- Year-round work – bill Delinquents monthly
- Mail Dues Notices in advance
 - First Notice – February 15th
 - Second Notice – March 15th
 - Delinquent Notice – April 1st then monthly until paid or dropped
 - May publish delinquents' names in bulletin



Defining Delinquents

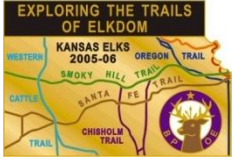
Dues are payable in advance. There is no grace period.

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 by notice.)
Dues not paid by <u>next</u> April 1 st	18-months delinquent (Don't let this happen!)



Membership Cards

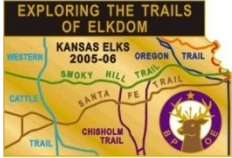
- Order early from Grand Lodge
 - Order Form supplied from Grand Secretary in September
 - On-line orders... (CLMS Home tab → Supplies & Forms)
<https://www.elks.org/Shopping/MembershipCards/default.cfm>
- No paid-to-date beyond life of card
 - Card stock is different color each year
- Emboss cards with Lodge's seal
- Destroy old card stock



Life Memberships

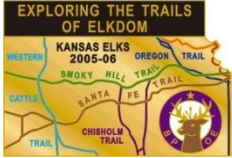
(§ 14.260 & Lodge's By-Laws)

- 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



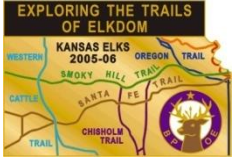
Life & Honorary Life Members

- Pays Grand Lodge per capita dues, insurance & any assessments; \$24.00
- Pays State Association dues; \$5.00
- 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



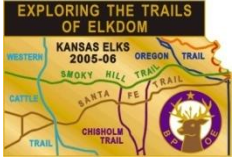
Identification Cards

- 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



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”
 - Member’s Privacy - You are not permitted to provide membership lists or addresses to any Members for any purpose including campaigning.



Grand Lodge Submissions

(CLMS2-Web – Roster – Control Panel – column 3)

Grand Lodge Submissions:

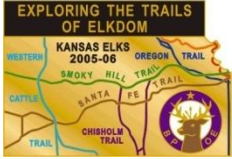
- November report submitted. [\[View\]](#)
- Click the button below to preview your Annual Grand Lodge Membership Report, which will be submitted **AUTOMATICALLY** on April 1st.

[Preview Annual Membership Report](#)

- [Confirm Officers and Committee Assignments](#)
- [Submit New, Renewal or Replacement ER/Secretary](#)
- [Confirm/Update Lodge Info](#)
- [Confirm/Update PER List](#)

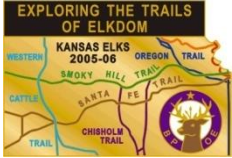
[Update Charitable Giving Data \(New!\) !\[\]\(e474458956c9a37fbf9586ddb60a7fa1_img.jpg\)](#)

- View & Preview Membership Reports
- Confirm Officers and Committee Assignments – *update annually and when changes are made*
- Submit New, Renewal or Replacement ER & Secretary – *update immediately after election annually and when changes are made*
- Confirm / Update Lodge Info – *update annually and when changes are made*
- Confirm / Update PER List – *update annually*
- Update Charitable Giving Data – *update at least monthly*



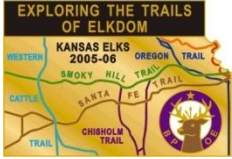
View & Preview Annual & Mid-Year Membership Reports

- 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 (see link on Roster tab)
- Membership counts “Out of Balance” – calculated vs. active list
 - Review CLMS2Web/Reports/CLMS Status/*Balance Count report*
 - Review CLMS2Web/Reports/Membership/*Current Lodge Year Changes report*
 - Contact your CLMS Coordinator if these reports do not help



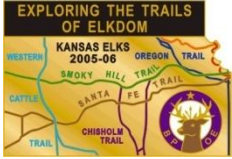
CLMS Staffers & Virtual Home Page

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



By-Laws Revision

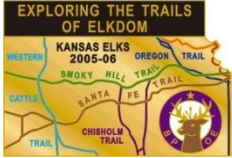
- General Revision due every 5 years
- Work with By-Laws committee
 - Staff assignment in CLMS for ER's appointed By-Laws Coordinator
- Appointed Coordinator uses By-Laws revision interface elks.org/grandlodge/bylaws/
- By-Laws on Lodge's [Virtual Homepage](#) in printable format for all members
 - No longer necessary to buy printed By-Laws books



CLMS Help for Secretaries

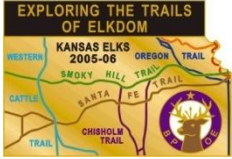
Useful links for HELP resources. All found at **CLMS2-Web → Support tab**

- How do I contact a CLMS Coordinator?
<https://www.elks.org/clms2web/reports/clmsCoordinators.cfm>
- Get answers from Secretary Forum:
<https://www.elks.org/clms2web/secyBoard.cfm>
- CLMS2 Knowledge Base – “How to” articles and videos:
<https://bpoelks.zendesk.com/hc/en-us/categories/200248628-CLMS2-Knowledge-Base->
- Open a ticket with the Help Desk:
<https://www.elks.org/clms2web/help/default.cfm>
- TeamViewer – Interactive Help with CLMS Coordinator:
<https://www.teamviewer.com/en-us/> Link to download is on the CLMS Support Tab



Other Aids Available

- KS Elks Web Site – www.kselks.org 
- CLMS Coordinators – *Frank Springer or Brenda King*
- DDGER'S – *{listed in Sunflower & on website}*
- FRS Coordinators – *Frank Springer or Jim Malone*
- KEA Committees – *{listed in Sunflower, summer edition}*
 - Business Practices – *Frank Springer, Chr.*
 - Insurance & Risk Management – *Walt Linthacum, Chr.*
 - Auditing & Accounting – *Jim Malone, Chr.*
 - Judiciary – *Dan Krug, Chr.*



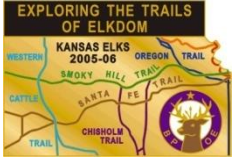
Kansas Elks Web Site

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)

CLMS section break → next section *Duties Expanded*



DDGER Visit

- Checklist of information and materials the DD needs to record and view
(*exhibit B, p. 18, Secretary's Manual*)
- Manuals available in PDF format at elks.org

EXHIBIT B

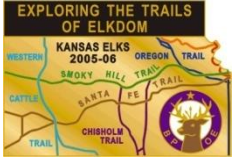
LODGE SECRETARY WILL HAVE THE SUCCEEDING INFORMATION READY AND LAID OUT FOR DISTRICT DEPUTY VISIT, IN THE FOLLOWING ORDER

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]

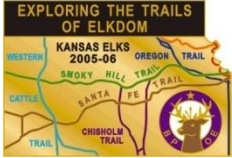
Please have P.E.R. Association minutes available for District Deputy! Minutes of this body should be held in the Lodge office and be available at all times. All funds generated or held by a P.E.R. Association, other than P.E.R. Association Dues, belong to the Lodge, may only be used if budgeted and approved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



Tax Reporting

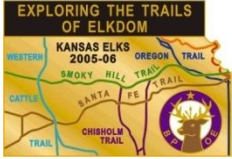


- Sales Tax (due 25th each month)
 - Liquor Tax (due 25th each month)
 - Liquor License (2-year license)
- } www.ksrevenue.org
- Payroll Tax (varies – semi-weekly, monthly or quarterly)
 - www.irs.gov/formspubs
 - <https://www.paycheckcity.com/> (3rd party payroll service)
 - Unemployment Tax (due quarterly)
 - www.dol.ks.gov
 - IRS 990 & 990-T Annual Returns (due August 15th)



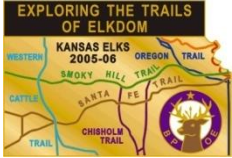
Federal & State Taxes

- 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 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

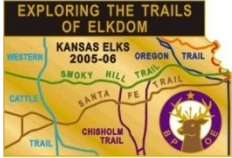
- Closed Door Policy protects this exemption; visitor register must be maintained. (see p. 6 & 7 *Secretary's Manual*)
- File 990 information return promptly
 - Due to IRS August 15th & upload PDF copy to GL
 - Up to \$5,000/year failure to file penalty and/or loss of tax exempt status
 - File 990-T for unrelated business income
- Keep Charitable Records Up-To-Date and Complete (update monthly and finalize annually)



Lodge Minutes – Accurate, Full & Complete

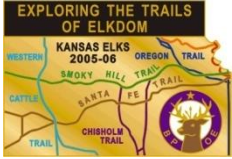


- Knowledge of Lodge's condition & activities is vital to members' interest & participation
- Well kept minutes provide a future reference when information is needed
- May use any type of minute book
 - Minute templates are available upon request springer.frank@gmail.com
 - Taping meetings is allowed. Transcribe the tape then erase it.



Lodge Correspondence

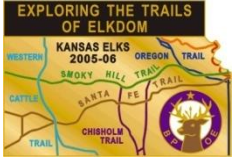
- CLMS directory information to Grand Lodge - **IMPORTANT**
 - Roster Tab - GL Submissions section
 - Confirm Officers and Committee Assignments
 - Submit New, Renewal or Replacement ER/Secretary
 - Confirm/Update Lodge Info
 - Confirm/Update PER List
- Obituary notice to Elks Magazine for any PDDGER or higher GL office
- GER Awards & GL Contests
 - GER Award Pin worksheet – CLMS-Web → Reports → GER Award Pin Worksheet
- Membership Inquiries from GL website www.elks.org
 - CLMS Alert (shown on Control Panel in Alerts section)
 - Respond to all inquiries within 7 days



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.

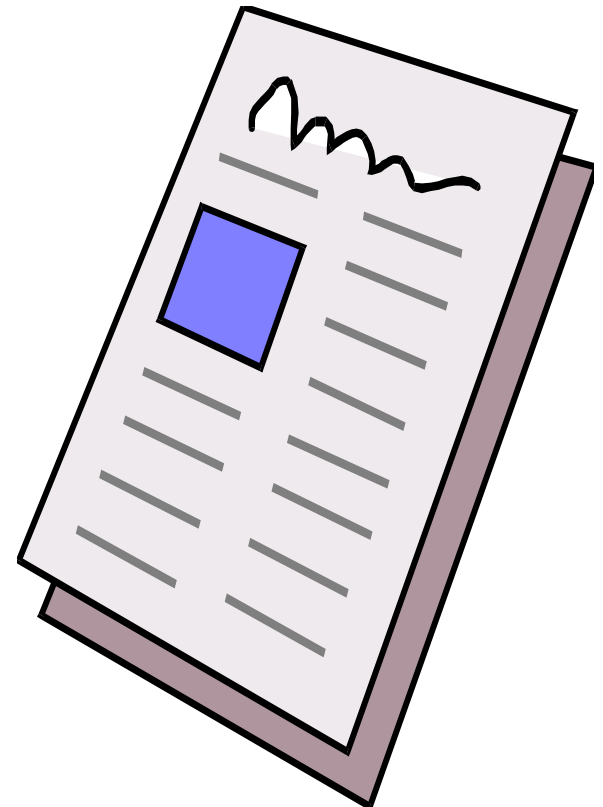
PGER-Sponsor

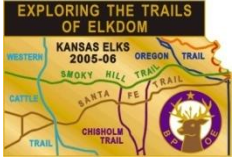
SDGER

DDGER

KEA Officers

Sunflower editor





Lodge Transactions Report

(exhibit M – p. 31) §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 _____

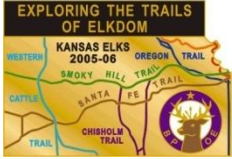
For six month period starting April 1, 20__ to September 30, 20__

<u>MEMBERSHIP TRANSACTIONS</u>		<u>DELINQUENTS</u>	
<i>(Based on yearly Worksheet)</i>			
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>		<u>DELINQUENTS</u>	
<i>(Based on yearly Worksheet)</i>			
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	_____

Duties Expanded section break → next section Q&A



Questions & Answers

CLMS Coordinators in Kansas

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