

Officers' Training Seminar

Lodge's Business Office

Everyone's Shared Duties

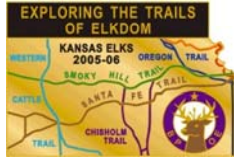
Grand Lodge Website

<http://www.elks.org>



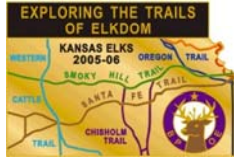
Frank Springer, Past State President

Chanute Lodge No. 806



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



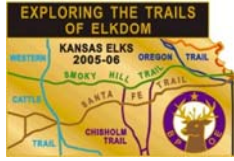
Secretary's Office is the Business office of the Lodge

- 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 \$50-million Liability Insurance through the G.L. program



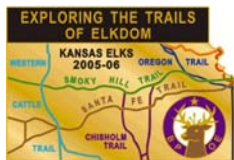
A “Good” Secretary

- A “good” secretary must be a dedicated Elk deeply interested in our Order and the Lodge, and ought to be the kind of person who is compatible with office work, one who takes pride in detail and figures, and especially an informed Elk who is familiar with the Laws and procedures of our Order.
- They must have time available to do the job, for the duties of the Secretary are constant throughout the Lodge year, requiring prompt and almost daily attention.
- A “good” Secretary cannot procrastinate!
- Notifies the Grand Secretary immediately when any change is made in the office of ER or Secretary.



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. 18)



Duties

- p. 2 *Secretary's Manual*
- Also see p. 18 *Statutory Lodge Secretary Duties*

OUTLINE OF 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 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.

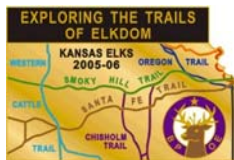
Provide ballots for election (if needed).

*Continue Year-Round Duties.

March:

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

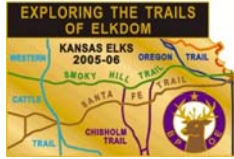
*Continue Year-Round Duties.



Lodge Financial Records

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

- Voucher System
 - Basic mechanism for responsible financial disbursements
- Secretary's Cash Book – example (p. 25 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 – [Walt Linthacum, Chr.](#)
- Uniform Chart of Accounts
 - *Auditing & Accounting Manual*
- Manual or Computerized record systems permitted



Other Aids Available

- G.L. "Fax on Demand" Forms 773-755-4750
- Elks Web Site – www.elks.org 
- CLMS (beta) Web Site – ChicagoLMS.net
- KS Elks Web Site – www.kselks.org 
- District Deputy-GER and Special Deputy-GER
- KEA Committees
 - Business Practices, Insurance & Risk Management, Auditing, and Judiciary



www.elks.org



- Secretary no longer needs to register on line
 - Automatic registration from Lodge's officers report
- May also register a *Cyber Assistant*
- Lodge pays an annual fee
 - Fee per lodge year (4/1 – 3/31, not prorated)
 - FREE for Secretary
 - \$25 for *Cyber Assistant*
 - May transfer registration any time at no charge
webmaster@elks.org

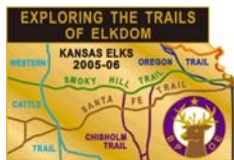


www.elks.org



Comprehensive Resource Center

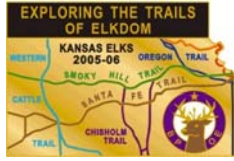
- News from Grand Secretary's office
- [Elks National Foundation news](#)
- Interactive Message Board with other Members & Secretaries
 - *Been there, done that*
- Download forms & news articles
- Maintain [Charitable Records Book](#) online
- Cut down on paperwork & response time
 - Maintain Elks Magazine mailing list
 - Order G.L. supplies
 - View & order Lodge roster
 - Order mailing labels
 - Submit Annual Membership Audit via e-mail
 - Create & maintain Lodge's "Virtual Home Page" at elks.org [Chanute 806](#)
 - Clip art and articles for Lodge's bulletin



www.elks.org



- User friendly RESOURCE CENTER – designed for those that don't know the difference between a mouse and a mouse pad
- [Elks.org User Manual](#)
 - Grand Lodge Website "Frequently Asked Questions"
 - Virtual Home Page User Manual

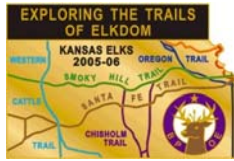


Kansas Elks Web Site

www.kselks.org



- Message board
- File monthly Membership Report on-line
- KEA News
- District News
- *Sunflower* on-line
- Directory (officers, committees, lodges)
- Drug Awareness Trailer Schedule
- Links to other Elk web sites ([KETCH](#) & others)



DDGER Visit

- Checklist of information and materials the DD needs to record and view
(exhibit C, p. 21, *Secretary's Manual*)
- Manuals available in PDF format at elks.org

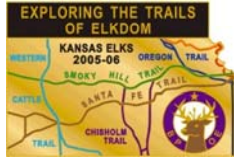
EXHIBIT C

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. Elks Magazine Certificate, Membership Roster update. Date issued _____.
4. 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
5. Date IRS Form 990/990T mailed _____.
6. Copy of Lodge By-Laws with general revision date. Date _____.
7. Copy of Lodge House Rules with general revision date. Date _____.
8. Salaries: Secretary \$ _____; Treasurer \$ _____; Tiler \$ _____; Organist \$ _____.
9. Initiation fee \$ _____; Annual Dues \$ _____; Reinstatement fee \$ _____.
10. Amount of fire insurance \$ _____; date when last adjusted _____.
11. 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 _____.
12. Is the Lodge incorporated? Yes No Date of incorporation _____.
13. What is current combined indebtedness of Lodge? \$ _____.
14. Current Profit/Loss Statement for each entity (Lodge, Club, Bingo, etc.).
15. Has Exalted Ruler appointed a Presiding Justice? Yes No; a Mediator? Yes No [GLS 13.020]
16. Does Lodge have Ritual coaching and are Lodge Officers able to recite Rituals from memory? Yes No
17. Has Exalted Ruler scheduled an Elks Training Session? Yes No
 Will that be done? Yes No
18. Do Lodge Secretary and Board of Trustees submit written transaction reports to the Lodge at 1st sessions in April and October? Yes No
19. Does Lodge have an active P.E.R. Association and do they 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 Records

- Complete a record of every Elk that was ever on the roll of your Lodge
 - ChicagoLMS.net (coming for all Lodges April 2008)
 - Keep an Active file (alphabetical order)
 - Keep an Inactive file (alphabetical order)
 - Should go back to the beginning of time
 - Permanent membership records
 - No Grand Lodge Officer or Agency has these records



Membership Records Updated (exhibit F – p.24)

EXHIBIT F

**FORM 3A
NEW MEMBER** Effective Date: _____

Lodge Name: _____ Lodge No. _____

PLEASE PRINT OR TYPE Member's No. _____

Member's Name: _____

Apt. #, Box or C/O: _____

P.O. Box, Street or Rt. _____

City, State & Zip: _____

By Initiation **RAI** By Cert. of Release **SAC** By Reinstatement **SOR**

Date Mailed: _____ Secretary: _____

The Elks Magazine
Circulation Department
425 W. Broadway Plaza, Chicago, Illinois 60654-4188
Form 3A Lodge # _____

**Form 3C
CHANGE OF ADDRESS (Only)** Effective Date: _____

Lodge Name: _____ Lodge No. _____

PLEASE PRINT OR TYPE Member's No. _____

Member's Name: _____

Apt. #, Box or C/O: _____

P.O. Box, Street or Rt. _____

City, State & Zip: _____

Old ZIP Code: _____

Date Mailed: _____ Secretary: _____

The Elks Magazine
Circulation Department
425 W. Broadway Plaza, Chicago, Illinois 60654-4188

**FORM 3B
CANCELLATION** Effective Date: _____

Lodge Name: _____ Lodge No. _____

PLEASE PRINT OR TYPE Member's No. _____

Member's Name: _____

REASON FOR CANCELLATION:
 Non-payment of dues **SDN** Deceased **SDD** Absolute Dinit **SDA**
 Transfer Dinit **SDT** (Address unknown) **SDM** Lives on list do not send Magazine **SDR**

Other Reason: **SDO** (Specify) _____

Date Mailed: _____ Secretary: _____

The Elks Magazine
Circulation Department
425 W. Broadway Plaza, Chicago, Illinois 60654-4188

**FORM 3T
TRANSFER DINIT INTO** Effective Date: _____

Lodge Name: _____ Lodge No. _____

PLEASE PRINT OR TYPE Member's No. _____

Member's Name: _____

Apt. #, Box or C/O: _____

P.O. Box, Street or Rt.: _____

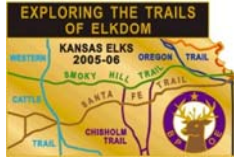
City, State & Zip: _____

Former Lodge No. _____

Date Mailed: _____ Former Member No. _____ Secretary: _____

The Elks Magazine
Circulation Department
425 W. Broadway Plaza, Chicago, Illinois 60654-4188

- Elks Magazine maintains membership records
 - Notify them of any additions, deletions & changes
 - Update on line www.elks.org/members/secys/rolodex.cfm
 - Manually update with forms shown above



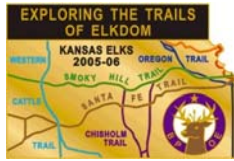
Membership Report

- **Monthly Membership Chairman Report**
 - *Please submit report by the 5th of every month → KEA Membership Chr.*
- ***Submit Report On-Line...***
 - *www.kselks.org → Members → Secretary's → Monthly Membership Report*
 - OR*
 - *www.kselks.org/lodge%20membership%20report1.asp*

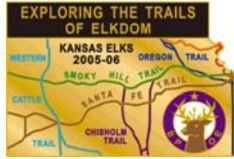
Application Processing

(exhibit H – p. 26)

New Member Application – Set up 4 Files

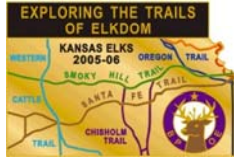


NEW – Not Yet Read	<ul style="list-style-type: none"><input type="checkbox"/> Application received with proper fee.<input type="checkbox"/> Reviewed for complete entry & signatures.<input type="checkbox"/> Secretary reads at Lodge Meeting. (Meeting #1)<input type="checkbox"/> Make copy & give application to Inv. Comm.
Investigating Comm.	<ul style="list-style-type: none"><input type="checkbox"/> Keep record or copy of application<input type="checkbox"/> Report by Investigating Committee. (Meeting #2)<input type="checkbox"/> Recover original application from Inv. Comm.
Ready for Balloting	<ul style="list-style-type: none"><input type="checkbox"/> Candidates' names and balloting date published.<input type="checkbox"/> Elected or Rejected – Notify (p. 27) (Meeting #3)
Ready for Initiation	<ul style="list-style-type: none"><input type="checkbox"/> Indoctrinated<input type="checkbox"/> Initiated – Member No. Assigned – Card Issued (Meeting #4)



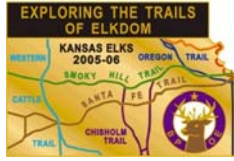
Application Processing

- Since 1983 it is illegal under our laws to hold balloting on an individual and then initiate that person on the same night.
- 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"



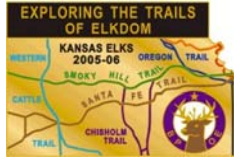
Reinstatement Processing (exhibit N – p. 32)

- 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
- Publish then Ballot



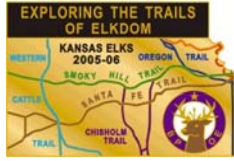
Request for Transfer Dimit or Certificate of Release (exhibit O – p. 33)

- Process PROMPTLY! No Lodge action necessary.
- If a Member in good standing
 - Grant Transfer Dimit immediately (exhibit J – 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 \$10 fee to original lodge
 - Original lodge issues Cert. of Release (exhibit K – p. 29)
 - Mandatory to grant but may make recommendation to the affiliating Lodge



Application for Affiliation (exhibit L – p. 30)

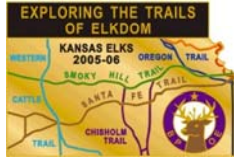
- Processed same as Reinstatement
 - Read at Lodge Meeting
 - Investigated by committee
 - Published in bulletin
 - Balloted - Elected
- Assign new membership number
- Notify old Lodge of affiliation



Absolute Dimits

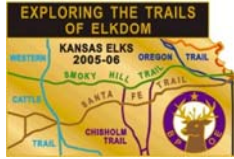
(exhibit M – p. 31)

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



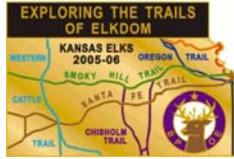
Member says "I Quit!"

- 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.
- Also, after tempers have cooled, the Member must be issued a replacement card should he request one as long as dues are still kept current.



Dues & Lapsation

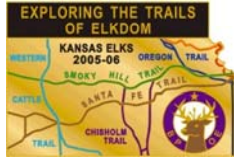
- Work with active Lapsation Committee
- Year-round work – bill Delinquents monthly
- Mail Dues Notices in advance
 - First Notice – February 15th
 - Second Notice – March 15th
 - Delinquent Notice – April 1st then monthly
 - May publish delinquents' names in bulletin



Membership Cards

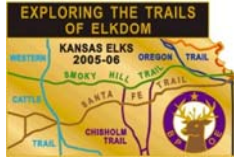
- Order early from Grand Lodge – Sept.
 - Form supplied from Grand Secretary
 - On-line orders...
www.elks.org/members/secys/

- Emboss cards with Lodge's seal



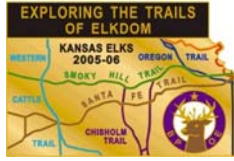
Life & Honorary Life Members

- Pays Grand Lodge per capita dues, insurance & any assessments; \$11.50
- Pays State Association dues; \$3.50
- Pays Lodge administration fee
 - Not less than \$5
 - Not more than ½ the regular Lodge dues
- All dues and fees are subject to sales tax in Kansas



Identification Cards

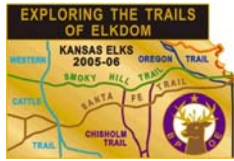
- Issued on request at no charge
(Statutes Sec. 14.140)
 - Spouse of Lodge Member
 - Member's Children or Stepchildren under age 21
 - Family of deceased Member
 - Unmarried widow or widower
 - Children or stepchildren under age 21
- Privileges may be restricted by house rules or by-laws
 - Can not restrict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



Life Memberships

(Statutes Sec. 14.260 & Lodge's By-Laws)

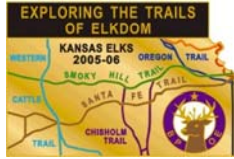
- Not granted automatically
 - Written request formally presented to the Lodge
- Request Published with date of ballot
- Secret ballot for each applicant
 - Requires two-thirds affirmative vote of members present
- Special card issuance & reduced dues do not become effective until April 1st of the succeeding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



Elks Magazine Update & Certificate

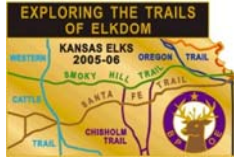


- Completed Annually –
Do Not Delay
- Certificate reviewed by DDGER during visit (item 3 on DDGER visit list)
 - DDGER visit list (exhibit C, p. 21)
- Avoids Member complaints –
no magazine
 - Send Change of Address form to
start delivery again



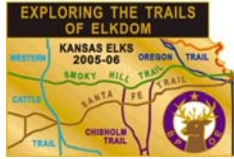
By-Laws Revision

- General Revision due every 5 years
- Work with By-Laws committee
- Get By-Laws Guide Book from G.L.
 - You get 4 copies
 - Fill in the blanks
 - Lodge approval
- Keep 1 and send 3 completed copies to Area Member on Judiciary Committee for approval – Kansas is in Area 6



Lodge Bulletin – Editor - Publisher

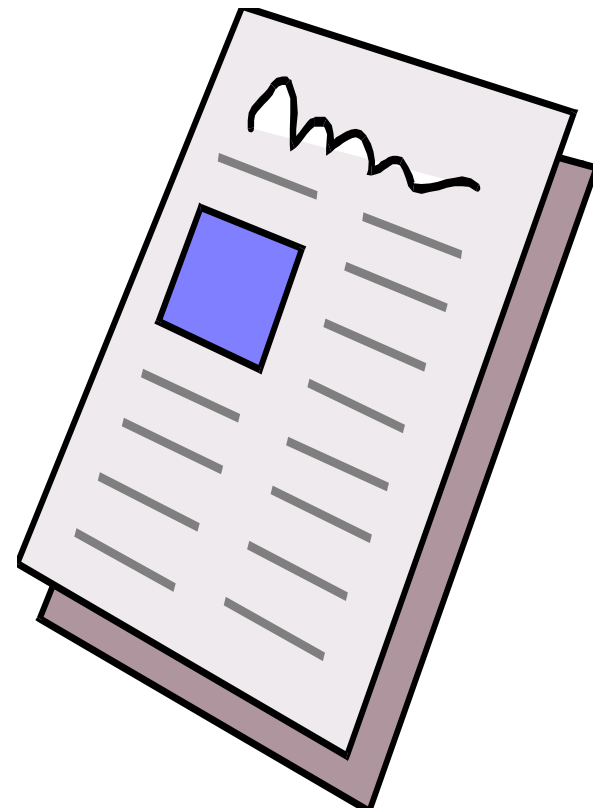
- Most knowledgeable on Lodge activities
- Get other officer's & member's input
- Set advance deadlines
- Include calendar of events
- Publish new member processing
- Keep members informed of Lodge's charitable & community activities
 - Creates desire to continue membership!

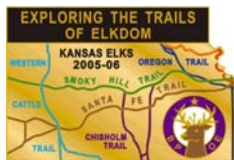


Bulletin Material – Make it Interesting

- Artwork from G.L. www.elks.org
- KETCH www.ketch.org
- KS Elks Assc www.kselks.org
- Pictures
- Humor
- History
- G.L. Newsletter

Put GER, Grand Sec., PGER-Sponsor, DDGER, KEA Officers, & *Sunflower* editor on bulletin mailing list.

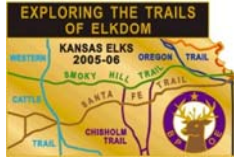




Tax Reporting

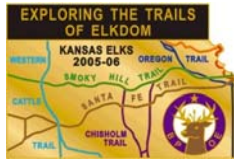


- Sales Tax (due 25th each month)
 - Liquor Tax (due 25th each month)
 - Liquor License Fee (annual)
 - Payroll Tax (varies – semi-weekly, monthly or qtrly)
 - www.irs.gov/formspubs
 - www.payroll-taxes.com
 - Unemployment Tax (due qtrly)
 - www.dol.ks.gov
 - IRS 990 Annual Return (due August 15th)
- www.ksrevenue.org/kswebtax.htm



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

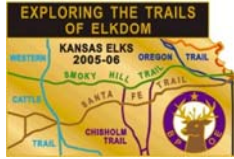
- Closed Door Policy protects this exemption (see p. 6, column 2, *Secretary's Manual*)
- File 990 information return promptly
 - Due August 15th
 - Up to \$5,000/year failure to file penalty and/or loss of tax exempt status
- Keep Charitable Records Up-To-Date and Complete



Lodge Minutes – Accurate, Full & Complete

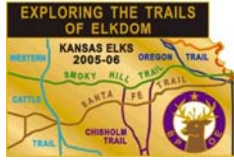


- Knowledge of Lodge's condition & activities is vital to members' interest & participation.
- Well kept minutes provide a future reference when information is needed.
- G.L. Minute Book provides easy format for minutes. May use a notebook too.
- Taping meetings is allowed. Transcribe the tape then erase it.



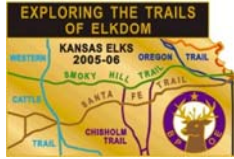
Lodge Correspondence

- Typically the Secretary is the only contact your Lodge has with others.
- Provide directory information to Grand Lodge
 - Directory information forms packet (Feb. after elections)
 - Names & mailing addresses for ER and Secretary; other Lodge info
 - Zip code “footprint” jurisdiction coordinate with DDGER if changing
- www.elks.org/members/secys/rolodex.cfm
- Grand Lodge/GER Awards & Contests
 - Track and forward requests. These recruiters have earned our gratitude & praise.
- Complete 2 G.L. statistical reports
 - Annual Report - March 31st – due 5/1 (exhibit B – p. 19-20)
 - Mid-Year Report - October 31st – due 11/15 (exhibit D – p. 22)



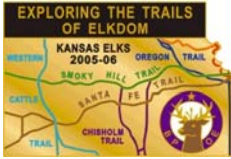
Annual & Mid-Year Membership Reports; Common Errors & FYI

- Do not change "Line 1", *Starting Membership*
- Report YTD figures only, not MTD or QTD
- The reporting year starts on April 1st and ends on March 31st
- Dues are payable in advance. There is no grace period.



Dues are payable in advance

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



Annual Report (exhibit B – p. 19)

- Due by May 1st
 - Form mailed to you by the Grand Secretary's office
 - Send with Grand Lodge dues

EXHIBIT B

ANNUAL REPORT (Page One)
To the Grand Lodge, Renewed and Protective Order of Elks of the United States of America
For the year ending March 31, 2006

Lodge No. _____

Dist. No. _____

ORIGINAL TO GRAND SECRETARY
COPIES TO:
FOUR SPONSORS
AREA MEMBERS OR MEMBERSHIP COMMITTEE
DISTRICT CLERK
STATE SECRETARY
STATE MEMBERSHIP CHAIRPERSON
LODGE FILE

OFFICERS FOR THE ENSUING YEAR (AS ELECTED IN FEBRUARY)

EXALTED RULER
Address _____ Zip _____

SECRETARY
Address _____ Zip _____

MEMBERSHIP STATISTICS FOR THE LODGE YEAR ENDING
Membership reported on lines 2-12 covers period April 01, 2005 through March 31, 2006

1. NUMBER OF ELKS REPORTED ON APRIL 1, 2005 ▶ DO NOT CHANGE STARTING MEMBERSHIP ▶ _____

2. Number of Elks initiated _____ 2

3. Number of Elks expelled by vote and certificate of release _____ 3

4. Number of Elks withdrawn by non-renewal _____ 4

5. TOTAL NUMBER OF ELKS ADDED TO ROLL (add lines 2, 3, and 4) _____ 5

6. Number of Elks stricken from roll for non-payment of dues _____ 6

7. Number of Elks expelled _____ 7

8. Number of Elks granted transfer credits _____ 8

9. Number of Elks granted absolute debts _____ 9

10. Number of Elks deceased _____ 10

11. **TOTAL NUMBER OF ELKS DROPPED FROM ROLL (add lines 6 to 10)** _____ 11

12. **TOTAL NUMBER OF ELKS ON ROLL (line 1 plus line 5 minus line 11)** _____ 12

13. **NET MEMBERSHIP GAIN or LOSS (circle one) ... (Line 12 minus line 1)** _____ 13

MEMBERSHIP STATISTICS FOR THE LODGE YEAR STARTING

14. Number of applications on hand, waiting for investigation _____ 14

15a. Number of candidates waiting for vote (THESE PRE-MEMBERS NOT TO BE COUNTED ON LODGE ROLL YET) _____ 15a

15b. Number of candidates waiting for initiation _____ 15b

16. Number of Life Members, (excluding Honorary Life Members) _____ 16

17. Number of Honorary Life Members _____ 17

18. Elks 6 months in arrears as of April 1st (THESE MEMBERS ARE ON APRIL 1st LODGE ROLL & MUST HAVE BEEN INCLUDED IN TOTAL ON LINE 12) _____ 18

19. Elks 1 year in arrears as of April 1st _____ 19

20. Elks 18 months in arrears as of April 1st _____ 20

21. **TOP MEMBERSHIP RECRUITER FOR YEAR SHOWN AT TOP, NAME:** _____ # RECRUITED: _____

CALCULATION OF GRAND LODGE PER CAPITA FOR _____ MEMBERS

22. For Grand Lodge Expenses and Operations \$4.50 per member (add to line 12)

23. For Subscription to The Elks Magazine \$3.50 per member

24. For General Liability Insurance Assessment \$5.04 per member

25. For Elks National Home Assessment \$1.00 per member

26. Insurance Experience Credit \$1.54 per member

27. **NOTE: FOLLOWING DUES WITH REPORT OR COMPLY WITH SEC. 18.019 AND REPEL DUES ON OR BEFORE MAY 1ST. FAILURE TO COMPLY WILL RESULT IN A FINE OF \$100.00.** \$11.50 per member X Line 12 = _____

TOTAL GRAND LODGE PER CAPITA _____

VALUE OF PROPERTY OF THE LODGE (ESTIMATED)

DO NOT TOTAL

28. Value of Real Estate, whether owned by Lodge or Holding Corporation 34. _____ Loans Outstanding

29. Value of Building, whether owned by Lodge or Holding Corporation 35. _____ Mortgage

30. Value of Furniture and Fixtures 36. _____ Items to be Repaired

31. Other invested assets 37. _____ Other debts

32. Cash on hand and in bank _____

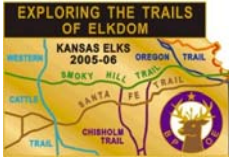
33. Amount of Revenue due to Lodge for dues, etc., remaining uncollected _____

WE HEREBY CERTIFY that Page One and Page Two are correct exhibits of the transactions of Lodge Number _____ for the Lodge year ending March 31, 2006.

ATTEST: _____ Exalted Ruler Seal of Lodge Must Be Affixed Here

_____ Secretary

(NOTE: Actual Form is 2-sided; Section D and Certification normally appear on reverse side.)



Annual Report (exhibit B – p. 20)

EXHIBIT B

ORIGINAL TO GRAND SECRETARY - COPIES TO: PIER SPONSOR(S); STATE GOVERNMENT RELATIONS CHAIRMAN

ANNUAL REPORT (Page Two - Side One)

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

FOR THE YEAR ENDING MARCH 31, 2006

Scorable from statistics furnished in

Lodge Copy of Charity Service Booklet

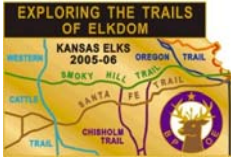
SURVEY OF VOLUNTEER, YOUTH, CHARITABLE AND COMMUNITY SERVICE PROGRAMS

YOUTH PROGRAMS	ELKS COUNTY OF PARTICIPANTS (R)	- INVOLVEMENT -						FOUNTAIN SPRINGS (DOLLARS ONLY)	
		# ELKS (S)	WITNESS (S)	ELKS HOUSE (S)	HELPERS (S)	ELKS AIDES (S)	HELPERS (S)	NON-CASE (S)	CASES (S)
Hoop Shoots	1001								
Youth Scholarship	1002								
Boy/Girl of Month or Year	1003								
Boy Scouts (see EAGLE below)	1004								
Eagle Scouts	1005								
Girl Scouts	1006								
National Youth Week	1007								
Boys/Girls State	1008								
Boys/Girls Clubs of America	1009								
Drug-Free Events	1012								
After-School Programs	1013								
Mentoring Programs	1014								
Youth Community Service	1015								
Antlers	1016								
Other Programs	1099								
ATHLETIC PROGRAMS									
Baseball/Softball	1101								
Football	1102								
Basketball	1103								
Bowling	1104								
Golf	1105								
Swimming	1106								
Youth Olympics	1107								
Soccer Shoots	1108								
Summer Camps	1109								
Other Programs	1199								
PROGRAMS FOR NEEDY OR HANDICAPPED									
Crippled Children	1201								
Eye Bank	1202								
Hospital	1203								
Blood Bank	1204								
Eye Glasses	1205								
Hearing Aids	1206								
Aid to Blind	1207								
Prosthetic Device	1208								
Wheelchair	1209								
Spec. Equipment Purch/Loan	1210								
State Major Project	1211								
Lodge Major Project	1212								
Other Programs	1299								

(CONTINUE ON REVERSE SIDE)

(NOTE: Actual Form is 2-sided. Complete from annual Charity Records Booklet.)

- Survey of volunteer, youth, charitable, and community service programs
 - Complete Charitable Workbook at least monthly!
 - Now available on-line



Yearly Membership Worksheet

YEARLY WORK SHEET
For Use in Preparing Your Lodge's
ANNUAL REPORT TO THE GRAND LODGE
(Refer to Pages 5 and 6, Secretary's Manual, for instructions)

This sheet is intended to you in the hope that it will prove helpful to you in preparing your Annual Report for the following year. If you will keep it up-to-date month by month, you will have at hand all the figures necessary for making up the report to be sent to this office at the end of the Lodge year. This sheet is for your use only. Do not return it to this office.

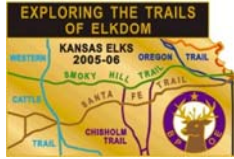
MEMBERSHIP STATISTICS	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	TOTAL
Number of Elks at date of previous report March 31st (or at institution) (line 1)													
Number of Elks who have been initiated during Lodge year (line 2)													
Number of Elks affiliated by dimit and certificate of release during Lodge year (line 3)													
Number of Elks affiliated by re-instatement (line 4)													
(add lines 2, 3, and 4) = Total Added (line 5)													
Number of Elks stricken from the roll for non-payment of dues (line 6)													
Number of Elks expelled during the Lodge year (line 7)													
Number of Elks granted transfer dimit during Lodge year (line 8)													
Number of Elks granted absolute dimit during Lodge year (line 9)													
Number of Elks deceased during Lodge year (line 10)													
(add lines 6, 7, 8, 9 & 10) = Total Dropped (line 11)													
The number of Elks on the rolls of March 31st (line 1 plus line 5 minus line 11)													
Number of Elks Delinquents:													
Number of members on roll, 6 months in arrears for dues (line 18)													
Number of members on roll, 1 year in arrears for dues (line 19)													
Number of members on roll, more than 1 year in arrears for dues (line 20)													
*CHARITABLE WELFARE AND PATRIOTIC WORK (Estimated) *-CONTRIBUTIONS													
Cash Contributions (In Dollars Only)													
10. Hoop Shows*													
11. Scholarship													
12. Scouting Activities (Boy Scouts, Girl Scouts, etc.)													
13. Other Youth Programs													
14. Youth Athletics Programs													
15. Programs for the Needy or Handicapped													
16. State Major Projects													
17. Patriotic Programs													
18. Veterans' Programs													
19. Community Service Programs (Support of Hospitals & Charitable Institutions, etc.)													
20. Community Recognition Projects													
21. Elks National Foundation													
22. Drug Awareness Program													
23. Other Programs													
24. TOTAL CASH CONTRIBUTIONS (add lines 10 thru 23)													
NON-CASH CONTRIBUTIONS - By Members @ \$_____ per hour or \$_____ per mile*													
25. Donated hours by members (estimated total for all programs) _____ hours*													
26. Out-of-pocket cash spent on charitable projects (telephone, postage, etc.)													
27. Transportation costs (mileage traveled) _____ miles*													
28. Contributions other than cash (estimated value of contribution)													
29. TOTAL NON-CASH CONTRIBUTIONS BY MEMBERS (add lines 25 thru 28)													
NON-CASH CONTRIBUTIONS - By Ladies @ \$_____ per hour or \$_____ per mile*													
30. Donated hours by ladies (estimated total for all programs) _____ hours*													
31. Out-of-pocket cash spent on charitable projects (telephone, postage, etc.)													
32. Transportation costs (mileage traveled) _____ miles*													
33. Contributions other than cash (estimated value of contribution)													
34. TOTAL NON-CASH CONTRIBUTIONS BY LADIES (add lines 30 thru 33)													
35. GRAND TOTAL (add line 24, line 29, and line 34)													

*NOTE: These figures may be estimated and amended later, if necessary, by letter to the Grand Secretary. DO NOT HOLD UP FILING THE ANNUAL REPORT PENDING COMPLETION OF AN AUDIT.

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EXHIBIT C

- Wall size worksheet aids in preparation of Annual Report
 - Complete this Membership Worksheet monthly



Questions & Answers

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Chanute, KS 66720

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620-431-3076 (home)

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PO Box 551
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ronlarson@sbcglobal.net

Ron Atkinson
PO Box 156
Galena, KS 66739

620-848-4019 (home)

atkinsonronald@hotmail.com

Secretaries meet again Sunday 8:00 – 9:50 AM for YUMA & CLMS round-table discussion.

ERs & Trustees welcome to attend prior to their 8:30 AM start.