

Idaho State Elks Association First Vice President Handbook



Steve Meier, Past State President	2016-2017
Curt Neely, Past State President	1995-1996
Keith Mills, Past State President	2006-2007
Ed Sanman III, Past State President	2013-2014

Updated April 2022

First Vice President Leading Knight's Position Introduction

Congratulations again. You made it through your second year and are now the First Vice President (First VP) of the Idaho State Elks Association. Your position now represents the Leading Knight role whose motto is "Charity." You have already become more visible to members in the association, have made new acquaintances and friends, and are recognized as a major "Player" worthy of responsibility and respect. Few people have sat where you are today and the honor the membership has given you should be noteworthy, but more importantly **humbling**. As First Vice President, this is how you **MUST** always think and more importantly, behave. The honor of this position is one that must be respect for the membership, but more importantly, an honor bestowed upon you by the membership.

In your past VP roles, you have learned to ignore member's faults and honor their virtues, learned about the Idaho State Elks Association, state project, ENF, other Grand Lodge programs and documents, plus met a lot of new people. Now, your role shifts to one supporting the Charity of Alms (e.g., ENF, State Projects, etc.), but more importantly, of thought, word, and deed. To be a leader in this position requires even greater dedication to the association, local lodges, state committees and state project than you have in the past. To say the work begins now is an understatement!

As your responsibilities have increased, your attention to the Elks and state association has also increased. By now, you know everything about how the Board of Directors, state project, state association and committee's work. However, one area where you have been exposed to, but not focused on, is the various state association budgets. Now you must consider aspects of these budgets for this current and next fiscal year plus the impacts of your decisions during the following 20 fiscal years as well. That is, you need to think both short and long term about how your decisions impact the state association.

As you engage in this process, there are no short cuts. Everything you say, everything you vote on, how well you understand the state investments, etc. directly impact the membership and what the association stands for now, and in the future. When you became Third Vice President, we discussed that our state has a multi-million-dollar state project and other million-dollar accounts. You are now the First Vice President and have major responsibilities to support these projects. It is a major responsibility and one that must be taken extremely seriously.

Since you became a Vice President, your other responsibilities gradually increased. This year, your homework and duties require you to allocate 8 -10 hours every week to perform your duties well. This time is in addition to attending the Idaho State conventions and trainings, DD clinics, state project meetings, hoop shoots and possibly, other state or national convention. This year becomes one where you must work very hard to ultimately become an effective ISEA State President.

However, for the remainder of the day, relax, enjoy the moment, and introduce yourself to more people. Tomorrow the work really begins.

Steve Meier, Past State President, Idaho State Elks Association, 2016-2017

Responsibilities

1. The Membership

As discussed previously and as a reminder, the first and most important responsibility while being a state officer and following your tenure is to **ALWAYS** remember that you represent the membership of the entire state. That is, as a state officer, you are always on point whether in your own lodge, at state conventions or in public. This is who the membership and public sees.

As First Vice President, you represent the station of the Esteemed Leading Knight whose motto is "Charity." Thus, your focus should be on assisting others with charitable works to various groups supported by the association (e.g., youth, veterans, elderly, etc.). Charity is the greatest of all the virtues. However, every association engaged in charity must have a budget to maintain that charity. The membership expects you to oversee and maintain our charitable works in a responsible manner. Consequently, you must work to understand everything about the state budgets in all categories to conduct that work. If you do not understand how to develop or evaluate budgets, contact someone with experience to explain it to you.

Pictures

Another reminder, when pictures are being taken, ensure adult beverages are always behind you plus know what is behind you. Never have a cocktail visible when taking pictures and always be careful when having dinner with beverages.

2. State Project

By now you know everything about the State Project, the board, and how everything functions. Again, you need to promote that project to the members in your district, ensure they understand what is happening with various initiatives and needs it may have. As part of this process, you will need to promote various programs. Continue to discuss these initiatives with the State Project Chair.

3. Elks National Foundation

ENF Grants: By now you know the difference between the various ENF and state grants. Ensure the lodges in your district know of the due dates and specifics related to each grant. Put these due dates in your Outlook calendar. Additional information about ENF grants is provided in the Appendix of this handbook and ENF website.

ENF Scholarships: In addition to ENF grants, you need promote the ENF scholarship programs to lodges and the membership in all lodges. Look at the different types and know deadlines. Put these deadlines on your calendar and send email messages to lodges to remind members about these scholarships.

4. Members Section in the Grand Lodge Website

Reports Section: The reports section is critical for you to review **monthly**. Pay close attention to delinquencies, ENF donations and numerous other reports. Three key reports are the Five-Year trends report, the Lapsed Membership totals, and Annual Membership Report.

Manuals Section: There are numerous GL manuals under a variety of committees. Again, review these manuals during the summer. Concentrate on the Auditing and Accounting sections.

5. Communication with Lodges

As the liaison between the ISEA President and your district, it is important to keep a good line of communication with all the lodges and state committee chairs. Further, you need to keep in good communication with the other state officers.

You should be having regular contact with the local lodges in your district plus should have met the new ER and their officer team at the DD clinic. Make sure you have their correct contact information.

Procedure

Update your Excel Distribution list of the names, email addresses and phone numbers of all Lodge Secretaries and Exalted Rulers.

- A. Immediately (that is while at the convention) contact the Exalted Ruler and provide them with your name, email address and phone number.
- B. Once you have returned to your residence, provide the Lodge Secretary with the same information.
- C. Have the Lodge Secretary put your name on their monthly lodge bulletin list and invitation list for major events held at their Local Lodge. Try to make at least two or three of these events in your district during your year.
- D. At least once between conventions, you should provide a brief ½ page comment to the lodges in your district.

6. Visitations

As previous years, you need to visit all lodges in your district at least once and preferably more. Similarly, you will be expected to supply MapQuest or receipts for fuel to the Board of Director's member managing the state budget.

During these visits, meet with the members and discuss various issues, identify potential problems, and as gather information about how the lodge is doing.

Procedure

- A. Set up schedule with Exalted Rulers of Lodges two weeks following the Grand Lodge Convention. You should coordinate with the District Deputy, so as not to conflict with their schedule. If possible, you should try to make your visitations in the late summer and fall to avoid winter travel.
- B. Notify the State President of your travel schedule.
- C. At a minimum during your visit, you need to discuss the following issues:
 - 1. The status of the state project with the membership.
 - 2. Promote the submission of ISEA Lodge grants if appropriate.
 - 3. Discuss the advantages of and submission of grants to ENF.
 - 4. Promote membership.

7. District Deputy Clinic Attendance

You must attend both District Deputy Clinics in your district. Again, be attentive to the issues being described by the Exalted Rulers and other lodge representatives. Specifically, are these the same issues that you identified last year repeating? If so, identify these issues and discuss them with the State President, other state officers and Trustees. This year, make sure you have identified a plan to address these issues.

Again, pay close attention to the plans and goals laid out by the GER.

Finally, once done, do a brief presentation on the State Project and State Association.

Procedure

Contact the District Deputy two weeks following the Grand Lodge Convention to identify the time and location of the DD clinic to be held in your area.

Ask the DD permission for 10-15 minutes to do a presentation on a topic.

Create a small presentation with bullet points that you can give to the membership. Again, do not do this presentation "Off the cuff: or "wing it." Although others know you now, this may be the first time in front of a new Lodge Secretaries, Leading Knights, and maybe the District Deputy. Make sure you impress them with your performance.

8. Relationship with the State President

This year your relationship with the State President is critically important. Use the President and another Past State President as your mentors. You need to be having regular contact with the President to ensure the President's programs are being implemented, that you are discussing problems within the state, and that you are in the loop about the issues impacting the association.

In addition, you now will be placed in charge of monitoring a variety of important committees. These include:

Accident Prevention / Risk Management (Along with the State President).

ENF (Along with the State President).

Business Practices.

CARE Project.

Grants.

Lodge Activities.

Membership Development.

Ritualistic.

Youth Activities.

As you can tell, these committees are the most critical committees in the state. You need to keep in **monthly** contact with the chairs of these committees to ensure the State Programs are being implemented.

Two of these committees you will also co-chair with the State President. Discuss the approach you want to take with the State President and decide what initiatives you intend to pursue as a team.

Committee Appointments for Your Year as State President

State Project Board Appointments. Get a list of current Board appointments and when their terms expire. Make a list of potential appointments (new or re-appointments) and vet these with State Project Board chair, previous State. President, etc. Those identified should have specific skill sets to address deficiencies on the board. Generally, look for professional people with good skill sets. Examples include, bankers, CFO/CPA, MD, DO, PhDs, JDs (attorneys), small/medium sized business CEO/owners etc. Again, the key is to work with the Board chair to fill positions with personnel that augment deficiencies on the board.

In addition to the committee chairs you identified, **some need additional approvals from the State Sponsor.** These include:

- a. Drug Awareness
- b. Veterans
- c. Accident Prevention

Idaho Elks Rehab Vetting Process

1. After potential candidates are identified, request professional resumes, curriculum vitae, etc. These should be reviewed by the IER Board Chair, State Sponsor and others who are advising you about the candidates.
2. Upon review, the candidate will be proposed to the State Trustees prior to the summer convention for final review and approval. Have the candidate's resumes or vitae available and bullet points to discuss the reasons/advantages of putting them on the board.
 - a) **CLMS and FRS Coordinators:** These are GL appointments. If a change is needed work with State Sponsor.
 - b) **Accident Prevention & Risk Management:** If you need to change the Chair, send the State Sponsor a letter about the reason(s) and a resume of the new chair. Make sure the State Sponsor approves this choice.
 - c) **Advisory:** The advisory committee (Past State Presidents) will train all lodge officers, state officers, and trustees.
 - d) **Convention Sites:** This committee usually consists of the Three Vice Presidents and Past State Presidents (usually 3).
 - e) **Drug Awareness Chair.** If change needed, send potential candidates resumes to the State Sponsor for their approval. Get someone with substance abuse prevention experience or solid knowledge of about substance abuse education.
 - f) **Financial Review.** Identify individuals with solid bookkeeping, accounting, or business background experience.
 - g) **National Convention Housing.** This consists of the Convention Chair, New President, New 1st VP and 2nd VP
 - h) **National Veterans Service Chair.** If change needed, send their resume to the State Sponsor for their approval.
 - j) **Hoop Shoot Chair.** If a change needed, consult with the Region 8 Hoop Shoot Director. State Sponsor approval is also needed as well.

9. District Hoop Shoot

This year, you **must** attend the district hoop shoot and the state hoop shoot if held in your district.

10. Media articles

Last year, you submitted articles to lodge bulletins and hopefully via social media. This year you need to do that again. Again, put time into these documents. They should be better than your previous article. Focus on something of importance. This article should be one single spaced page or more. Include interesting topics, activities you have participated in and/or discuss problems that lodges may be encountering.

11. Summer Convention and Winter Training Session

Summer Convention

This year, as First VP, you need to have a significantly better report than last year. Further, because you have been practicing at Toastmasters and using other techniques, your presentation should be significantly better than in the past. Have specifics ready to discuss in meetings with the officers, advisory committee, and the general business session. You should be using bullet points and handouts during these sessions to help you when meeting with the Trustees and advisory committee.

Again, you should meet at least 10 NEW people you have never met during each evening of the Convention and Winter Training Session and talk to them for a minimum of 5 minutes (total about one hour of your social time).

Photographer

Immediately following your installation, have your picture taken by the State Photographer. You then need to have 6/8 or 8/10 picture sent to each lodge in your district. Do not use your same pictures from the previous years.

Identification of Lodge Members and Balloting of Association Candidates

Like last year, before the Friday business session, you will contact all Exalted Rulers in your district and solicit the correct number of Elk attendees that will be attending the business session on Friday. This identification is so that you will have the correct number of ballots for voting. Once the information is collected, you will provide that information to the State Secretary.

At the first break the State Secretary will provide you with ballots for the election. These are to be provided to the ERs. You must check to ensure the

correct number of ballots are given to the ERs and returned to you. Once received, these will be given to the State Secretary. Correct following of the balloting procedure is critical since one vote can change the outcome of an election.

Exhausted Roosters

Like last year, you will be attending the Exhausted Roosters group and may be asked to give a speech.

Winter Training Session

This session will be critical for you. You will need to provide your initial State President's budget for review, discuss committee assignments, receive training from the advisory committee, and do other tasks. These materials are discussed in greater detail later in this document.

Since you are now an EXPERT in some topic area, you may be asked to present on the topic. Discuss your potential topic with the Winter Session Coordinator.

In addition, provide feedback about how lodges in your district are doing to the State President and Board of Directors. Provide specifics and suggestions for assistance.

12. Time Needed to be Successful

As indicated earlier, this year is one for work. As observed throughout this document, there are numerous tasks that need to be accomplished. This takes time. For you at this stage, you need to allocate about 8-10 hours per week to accomplish the required tasks beyond your visits and various functions. Further, there are no short cuts. Schedule specific periods of time in your calendar every week for just VP stuff and remain consistent and persistent. Doing so will make it easier to get things done and develop a pattern as you advance as you become state president.

Being the First VP in the Idaho State Elk's Association is serious business and you need to take it as such. This position is more work than social. You represent the membership of the association, have major responsibilities for multi-million-dollar projects, plus you will need to develop a state budget and complete a lot of other tasks before you become State President (e.g., select and contact committee chairs, etc.). Take these responsibilities seriously and start working on them now or you will have difficulties later this year.

Other Information

State Uniform

The state uniform is the Navy-Blue blazer, White shirt or blouse, Idaho State Elks Tie or Scarf, Medium Gray Slacks or Skirt, Black Socks or Nylons (if appropriate), Black and shined leather shoes (closed toe with a 3-inch heel or less for women).

In token of our appreciation for the men and women in our military, we have designated Fridays at state events as "Red Shirt Fridays." The "Red" color designates "Remember Every Deployment." Thus, Red shirts or blouses are worn on Friday with the current State Elks tie or scarf.

These products are purchased from a state clothing vender by the National Convention Chair. These items need to fit and look good on you. So, if necessary, go to a good clothing store to get correct measurements. Remember, you represent the state organization with other officers to the membership and public. You set the standard. If you look sharp the membership will look sharp and activities and events go well. The opposite applies as well.

Saving and Spending This Year and Next

Right now, you should have about \$1400 in the bank. This year you need to be saving another \$750 - \$1000 by March, because at that time you will begin to spend it.

For the State June convention when you are installed as State President, you need to spent funds on the following items:

State President's Pins: Approximately \$750 depending on quality and quantity.

State President's Party: Depending on what you order and purchase, it can range from \$500 - \$2,000.

Accommodations for Visiting Family Members: You will need accommodations for family members to attend your installation as State President. This amount will range between \$500 - \$1000 if you pay for them. The amount will also depend on how long they stay, food, semi-formal dinner on Saturday evening, etc.

Baskets for Visiting Dignitaries: You will need approximately \$200 for gift baskets given to GL dignitaries as well as out of state Presidents and Vice Presidents. This cost may be covered by the host lodge. However, **make sure you do not forget it.**

Private parties for Visiting Dignitaries: You may desire to have a private party of people. Allocate \$200 for food and adult beverages. Don't be

cheap here. Have mid or top shelf beverages. No Old Smuggler Scotch.

Gifts for your State Secretary and Others. You may want to purchase gifts for some people who have helped you get to where you are. \$1 - \$200

Gifts for the Outgoing State President and State Secretary as well as their Spouse/Partner/Friend.

You will need to solicit donations for a gift to be provided to the outgoing State President and State Secretary. If considering purchasing a brick or similar monumental item, ask the President about it. Some do not like these types of items. \$1 - \$300.

Just to get you through the convention alone, you will spend approximately \$2,000 - \$3,000. If you have followed our advice, by March you should have about \$2,500 saved. Being the State President has obligations and traditions you need to follow to be a good social host and demonstrate the social graces of the office. If you do not understand what is required, contact a Past State President or their spouse with those skill sets to guide you. You do not need to go overboard but don't be cheap as well.

Major Tasks to be Accomplished

Now that you have been installed and in addition to your other tasks, you also need to begin thinking about becoming the next State President. A full list of items for the entire presidential year are included in Appendix A. To be prepared, you need to have the following tasks accomplished **by November**.

a. State Secretary

Your relationship with the State Secretary is one of the most important that you will have during your year. This person will be responsible for taking minutes and notes at business meetings, Board of Director's meeting, updating the state website and other functions. They will also have access to different CLMS reports than you do. This person can keep you on task. Use them.

b. Develop a Preliminary Budget

You will need to develop a preliminary budget that will be presented to the Board

of Directors at the Winter Training Session.

Procedure

- a. Contact the current State President and have them email you an electronic copy of their current budget.
- b. Review the state association trends regarding membership. Use this number as a base to guide you. Here is where the CLMS projections worksheet can help you.
- c. Create a budget using Excel. Use formulas to ensure your totals are correct.

c. Identifying Committee Chairs:

During your Presidential year, you will delegate a lot of work to committees. This year you need to identify who will chair of those committees. Some chairs you may retain while others may need replaced. These choices are the first major decisions you make, and if replacing chairs may cause hurt feelings. Further, some vocal members may create issues after they have consumed too many adult beverages. Be prepared for that.

In your year, there will be a change in Committee Chair selection. Unless otherwise agreed by the state officers or required by additional review, all committee chairs will be asked to step down as chair after serving 5 years in their position and becoming a district chair if they desire to continue. This will ensure new members are being recognized but more importantly, that members may be able to receive experience within the state organization. It is also recognized that some committees need additional skill sets beyond just being a member. These include Financial Review, Drug Awareness, National Convention Housing, Accident Prevention, CLMS, and others.

A suggestion, when considering a change, talk with the previous chair about the situation. Have them step back but still be majorly involved and mentor the new chair. When doing so, discuss the importance of bringing up younger members for the purpose creating future leaders in the organization.

Some chairs may be reluctant to do so (especially if they have occupied the position for a long period). However, with the requirement for term limits noted above and solid arguments for doing so, talk to them directly if you are making changes.

Ultimately, although you have the final decision on who you select as your leadership team, consider bringing in a few younger people to serve on state committees.

d. Summer Convention

The summer convention will be your convention to oversee and help organize. Since the convention will be held in your district (probably by your lodge), you need to be regularly discussing aspects of the convention with the Host Lodge Chair, convention coordinator, plus sitting in on convention meetings, etc. The theme, how it is perceived, etc. reflects directly on you and the State President. Do not mess this up. Pay attention to detail and know what is going on.

e. Spouses/Partners/Friends

There are various tasks spouses/partners/friends need to do as well. These include various functions for other significant others of dignitaries and Elks.

1. Send a letter to all Board of Director's Members, State Committee Chairs, and ERs requesting a small donation for getting the outgoing President's Spouse and Secretary's Spouse gifts.
2. Have your spouse review the Spouse's Handbook for specific details regarding this position.

Final Closing Remarks

This year is your last year of training. How well you perform as State President will be evident by how hard you worked during these past three years. If you worked hard, studied, and followed the guidance we have provided for you, your next year will be fun and rewarding. However, if you have not studied, you may be disappointed with how your year progresses.

For you, this year is to put together all you have been learning. Soooooo, if you do not know something, learn it during this year because next year there are no do-overs. Remember, you represent the Idaho State membership. Make the membership proud of how you act, how you look, your accomplishments, and be ready to take the organization to the next level.

We hope your year goes well and wish you the best.

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Calendar Page / Things to do

June

- a. Update your Excel Spreadsheet.
- b. Contact all ERs and Lodge secretaries. Provide contact information, get on their mailing lists, etc.
- c. Get your framed picture to the local lodges in your district.
- d. Learn about ENF, Grand Lodge manuals, etc.
- e. Learn about budgets and the budgeting process.
- f. Send letters to ERs and secretaries regarding all grants. See Appendix A.

July

Following the Grand Lodge Convention

- a. Contact the DD. Identify the time and location of the DD clinic.
- b. Contact the lodges in your district to schedule visitation times.
- c. Contact the State President and provide them with your schedule.
- d. Learn more about the association, duties of different groups, review more committee manuals from the GL website.
- e. Email ERs and Secretaries regarding ENF grant deadlines.
- f. Identify your State Secretary.
- g. Begin talking with the Host Lodge chair about the Summer Convention.

August

- a. Send an email to ERs and Lodge Secretaries regarding the grant deadlines
- b. Attend the District Deputy Clinic.
- c. Contact the State President and get an electronic copy of the budget.
- d. Contact the State Hoop Shoot Chair. Find out when the District, and State hoop shoots will be held and where.

September

- a. Send a letter to the lodges regarding the Winter Training Session.
- b. Send letters to local lodges.
- d. Contact your committee chairs to see how they are doing.
- e. Begin working on your state budget.

October

- a. Send an email reminder regarding the Winter Training Session to lodges in your district.
- b. Finalize your budget to present to the Board of Directors at the Winter Training Session.
- c. Talk to the Convention Coordinator about the Summer Convention.

November

- a. Attend the Winter Training Session.
- b. Attend as many break-out sessions as possible.
- c. Present on a specific topic if asked.
- d. Start thinking about committee chairs.
- e. Contact the Directory Chair. Have them send you an electronic copy of the directory to be used to help you identify potential chairs.

December

- a. Take a break.
- b. Make reservations at the convention hotel for the Idaho State Summer convention.
- c. Begin identifying and contacting your committee chairs.
- d. Start thinking of a design for your State President pin.

January

- a. Attend the District Hoop Shoot.
- b. Contact the DD regarding their next meeting.
- c. Continue contacting committee chairs.
- d. Send a letter to your local lodges.
- e. Begin attending convention meetings (if applicable) until the Summer Convention begins.
- f. Identify what will be placed in the dignitary rooms as a host packet.
- g. Identify potential family members you want to attend the convention. Send them invitations, reserve rooms for them, etc.

February

- a. Attend the District Hoop Shoot in your district.
- b. Send a letter to the new ERs. Identify when their installation will be done and when.

- c. All committee chairs should be identified. Send this information to the Directory Chair and State Secretary.
- d. Begin working on your final Presidential budget.

March

- a. Attend the State Hoop Shoot
- b. Send a letter to the Local lodges
- d. Attend lodge officer installation ceremonies if desired.
- d. Start working your acceptance speech.
- e. Start thinking of gifts you want to purchase for people.
- f. Order your State President pin (about 750) or more if you plan to attend out of state conventions.
- g. Send in your state newspaper (if applicable) or State Secretary to post in the ISEA Website

April

- a. Contact your committee chairs.
- b. Attend the District Deputy Clinic.
- c. Get the membership numbers from the GL website.
- d. Finalize your state budget.
- e. Finalize state convention plans with the Host Lodge Chair.
- f. Continue working on your speech.

May

- a. Talk to the Convention coordinator again. Go over everything one more time.
- b. Review Scripts for the June Convention.
- c. Make a final report to be read on the convention floor.
- d. Practice giving your speech at least 5 times.

June

- a. Attend the State Convention.
- b. Present your final budget to the trustees.

Appendix A

Tasks to Review / Accomplish / Consider While First Vice President and President

1. Manuals and Documents

Get the following manuals 1 ½ years before your installation. The starred (***) manuals will be included in your President's manual.

- a. Grand Lodge Constitution & Statutes Annotated
- b. ISEA Constitution & By-Laws ***
- c. Grand Lodge Manual on Protocol
- d. ISEA Officer Manual ***
- e. ISEA Officer and Committee Directory (updated yearly)
- f. ISEA Conventions Handbook ***

2. Vacation Schedules

Make sure you arrange your vacation schedules at work.

3. Get to know your Counterparts

Identify your fellow State Presidents from Oregon, Washington, Alaska, and Montana who will be President the same year you are. Attend their summer conventions (especially the Washington Convention. Most will be in attendance there). **NOTE: Invitations to attend Out of State Conventions is required before attending these events. Further, State Sponsor Approval is required as well.**

4. Design and order State Presidents Pin.

Order between 600-1000 pins. The number depends on out of state conventions you will attend. You can order more, but they are cheaper in a large lot initially.

5. Develop an Operational Budget for your Presidential Year.

(Preliminary budget at Winter Training Session in November. Approval of final budget at Summer convention).

Be sure to allocate funds for Out of State **presenters (if possible)** at the Winter Training Sessions (i.e., pay their registration and hotel room).

Grand Lodge committee members on official visits to states are paid a per diem by GL. However, the state or host budget will comp their registration costs.

6. 1st Vice President Spouse

Send a letter to all Board of Directors members, State Committee members, and Lodge ERs requesting a small donation for getting the outgoing President's Spouse and Secretary's Spouse gifts.

7. VIP Invitations to your Installation Convention.

Work with Lodge on housing arrangements for your VIPS. Registrations (not food or activities) for out of state VIPS are complimentary. Housing is complimentary for the State Sponsor and visiting PGER (and SDGER if lodge can get a 3rd comp room). This is usually coordinated through the host lodge or Convention Coordinator.

VIPS usually include:

- a. Sponsor
- b. Sponsor will invite PGER guest
- c. President of OR
- d. President of WA
- e. President of MT
- f. President of AK
- g. GL Committee people from OR (check with State Sponsor)
- h. GL Committee people from Area 8 (check with State Sponsor, will they be doing presentations?)
- i. Family
- j. Personal Elks friends from other states (let State Sponsor know if they are an Elks VIP)

8. Visiting PGER (or GER).

Work with the State Sponsor on this. They may want to meet instead.

- a. You and your spouse (as incoming President) should make every effort to meet the PGER at the airport (or hotel if they arrive by auto).
- b. Help transport luggage, etc. at airport and hotel.
- c. Have a welcome basket in PGER room. Have **Two** copies of convention booklets available. Also, include a bottle of favorite adult beverages for the State Sponsor, visiting PGER and Spouses. This may include snacks, flowers, etc.
- d. Have other State VIPS (VPs) if possible present to greet PGER.

9. Appointments

Make the following appointments:

- a. Committee Chairs (+ 6 months)
- b. Committee Members (+ 5 months)
- c. Idaho Elks Rehab Board appointments (+4)
- d. Historian (+5 months)
- e. Organist (+5 months, if available)
- f. Parliamentarian

Talk with current President & Vice Presidents about Committee Chair & member appointments.

Talk with your Committee Chairs about their willingness to serve and who you would like to appoint. They may have suggestions on the appointments. Also, let the committee chairs know what your expectations for the committee are. Find out if the Committee chair needs some budget for operations.

Send letters to all people being appointed notifying them of the appointment and what committee(s) they are on. Let committee chairs know who is on their committee.

10. Information for the Grand Secretary

Get this form from current state secretary Fill out the form including names/addresses of State Officers, select State Committee Chairs. You will need each member's name, lodge #, member#, mailing address and ups address.

11. Gifts at Installation

- a. Outgoing State President & Spouse (Plaque, etc.)
- b. Plaque for Outgoing State Secretary & Gift for Spouse
- c. Plaque for Outgoing State Trustee Chair (Trustee Vice Chair should do)
- d. Badges for PSP and spouse
- e. Badges for Incoming State President and State Secretary and Spouses
- f. Optional – Badges for Past State Secretary and Spouse and Past Trustee Chair and Spouse.

Things Immediately to do after you Become State President

12. At the Grand Lodge Convention

- a. About 1-2 months before GL Convention, you will get a form from the current State Secretary (or contact Area 8 Fraternal Committee member) for carrying the State Flag in the Opening GL Ceremony.
- b. Carry State Flag at Opening Ceremony (register w/ GL Fraternal Committee booth Saturday). There is a form you need to fill out about 1-2 months before Grand Convention.
- c. **Be sure at the Opening Ceremony to have a BLACK Sharpie pen to sign the left edge of state flag (in the white area that attaches to flagpole) and attach one of your President Pins.**
- d. Attend Monday meeting with GER-Elect (ERs are also in this meeting)
- e. Get your picture taken with GER-Elect
- f. Run the breakfast meeting with OR on alternate days (See your convention manual)
- g. Make sure 1 or 2 people are sent to Convention Center to reserve setting and set up Idaho Signs.
- h. Attend each Grand Lodge session. **DO NOT FALL ASLEEP**

- 13. President's Spouse:** Work with National Convention Chair on a brunch for spouses. Send invitations to all ID spouses who are attending GL, including the State Sponsor Spouse, GL Trustee Spouse, SDGER Spouse, select out of state VIP spouses.

14. Grand Lodge Breakfasts (These may be optional)

(Coordinate with the National Convention Chair and OR St. Pres & Sec.)

- a. Breakfast w/ Oregon Elks @ 6:00am.
- b. ID will run the breakfast 1 day and OR will run the other 2 days (next year ID 2 day, OR 1 day).
- c. Facing the Head table (left side – ID/OR: right side – Grand Lodge). On the day ID runs the breakfast, from left ID VIPS, OR Sec., OR Pres., ID Sec, ID Pres. ID VIPS will be current VPs and/or ID PSPs.
- d. At 6:00am, ask that the doors be closed.
- e. Roll Call of Lodges and DDD (by St. Sec.).

- f. Introduction of ID VIPs (not already introduced), VP, PSP, St. Trustees, etc.
- g. Turn over to Oregon President (repeat steps e and f for Oregon).
- h. Turn over to St. Sponsor to introduce GL side and other GL people at breakfast.
- i. Turn over to ID President, indicate order for tables to go through the buffet line (head table 1st).
- j. When head table is done eating, announcements will be made regarding the group picture, legislation, daily state events, etc.

15. Idaho Lodge Visitations. Make a tentative schedule. Get as many done before winter conditions set in. Validate dates with lodges. Let and DD know about your schedule for their District. Invite state committee members who are members of that lodge to come to the meeting. This event can be a lodge meeting, special dinner, or other special Lodge occasion. Based on budget constraints, the meeting may be with groups of lodges rather than visiting all lodges in the state.

16. Idaho Conventions

- a. Develop an agenda
- b. Coordinate with the local lodge ER on welcoming local dignitaries (Mayor, Police Chief, etc.) if appropriate.
- c. Incoming President's Spouse with the ER's Spouse arranges the Spouses Brunch, sends invitations, etc. The host lodge pays for out of state invited spouses.

17. Hoop Shoots

- a) Attend the State hoop shoot.
- b) Attend Regional Hoop Shoot in Portland, OR (mandatory) and bring a \$100 will with you. The 4 St. Presidents (AK, WA, OR, ID) put up \$100 each and at the end of the Hoop Shoot, the 4 Presidents have a shoot off, winner gets the \$400 donated to ENF in his/her name.
- c) After the Hoop Shoot on Saturday night there is usually a WA/OR PER Association dinner at a Lodge in Portland/Vancouver area (\$10/year to join).

18. Annual Report to Grand Lodge (April/May)

Submit the Annual Charity Report to Grand Lodge.

19. Gifts when going out of office

- a. For your spouse.
- b. For your State Secretary and Spouse.

20. Official Visits to other States**(Let the State Sponsor know about all you plan to attend).**

- a. Oregon Spring Convention (End of April) (semi mandatory).
- a. Optional - OR Fall Training (October before installation, get invitation).
- b. Optional – WA Summer Convention (3 weekend of June, get invitation from WA President).
- c. Optional – MT Summer Convention (week after GL Convention is done, get invitation from MT President).
- d. Optional – AK Summer Convention (1st of May, get invitation from AK President).

21. End of Year

- a. Make Certificates of Appreciation for all State Committee Chairs for presentation at Summer Convention.
- b. Make Letters thanking Elks Rehab Board members who are not continuing into new year.

22. Winter Convention after End of President's Year

- a. Close checking account and return money to Trustees (old State Secretary).
- b. Present final budget/expense report at Trustee meeting (old State Secretary).

Appendix B

Example of an Initial Letter to Exalted Rulers for State Grants

Notice of Intent for Exalted Rulers

The Idaho State Elks Association (ISEA) is an organization designed to support _____.

At this time, the ISEA is soliciting proposals from local lodges for _____. Proposed projects can range up to, but not exceed \$_____ per Local Lodge. Funds provided for a project may be less than proposed.

These projects are designed to _____

Process

1. Application materials are to be received or postmarked no later than _____.
2. Application materials will be reviewed by the ISEA Board of Directors.
3. All decisions for awards will be announced at the Winter Training meeting in November.

Appendix C

Reminder Letter to Local Lodges Regarding Grants

Hello all,

This is a reminder that ISEA Grants are due in _____. Note that these grants provide solid opportunities for Lodges to _____.

This is a perfect opportunity for your local Lodge to _____.

Interested parties are invited to visit the Idaho Elks Rehab website @, www.idahoelksrehab.org or the Idaho State Elks Association website @ www.idahoelks.org. A PowerPoint presentation describing the process and additional information can be found on both sites

Sincerely,

Appendix D
Letter to Lodges
Food and Beverages for Winter Training Session
Social Event

Hello all,

At the Winter Training Session in November, I am hosting a social relaxation gathering Saturday afternoon. I am requesting each lodge bring some food, a bottle of an adult beverage, or a case of beer to assist with this event. I will provide plates, napkins, glasses, etc.

If your lodge is willing to participate, please send me an email informing me of what type of item you plan to bring.

Thank you

Sincerely,

Your name, Vice President N, S, or E

Appendix E

Information Regarding Grand Lodge / ENF Grants

- 1. Beacon Grants**
- 2. Gratitude Grants**
- 3. Promise Grants**
- 4. Freedom Grants**
- 5. Community Investment Grants**

Beacon Grants

For Continuing Projects

Do Not Need to Meet the Per-Member Giving Goal

Cannot be split between two projects.

Look for five things.

1. **New:** If your Lodge has not received a Beacon Grant before, it must be used to start a project that the Lodge has never previously funded. If your Lodge received a Beacon Grant in the past, it should continue that project.
2. **Ongoing:** Project must be something repeatable that the Lodge is committed to continuing on a weekly, monthly, quarterly, or annual basis. Funds should be used in the same manner every year.
3. **Elks-led:** Project requires hands-on Elk involvement. The Lodge should be in charge of the grant funds and project details.
4. **Charitable:** All CIP grants must be focused on helping those in need and addressing local issues. The project cannot benefit only the Lodge or Lodge members.
5. **Active Project:** Beacon Grants cannot be used as donations of funds and supplies. Elks should be actively serving the community. If people see Elks doing good things, they'll be inspired to join!

Due Dates: Check the ENF website for actual dates.

Applications usually become available online July 1.

Applications must be submitted before the project takes place.

Applications usually close March 31

Project activities must be completed by July 31

Final Report Forms are due August 31

Gratitude Grants

Only for Lodges that Meet the Per-Member Giving Goal.

Can Get a \$500 Bonus

Gratitude Grants offer an opportunity for Elks to think about how best to strengthen their community. Gratitude Grants are the ENF's way of saying thank you to every Lodge **that meets the National President's per-member-giving goal**, so start planning your grant today! The possibilities are endless!

Can be used to:

Serve Veterans

Support local, charitable activities.

Partner with students

Other things

See the ENF Website for more details

Use to raise the Lodge's profile, energize membership, encourage former members to return to the fold, and gain the notice of people.

Due Dates:

Applications usually become available online July 1

Applications must be submitted before the project takes place.

Applications usually close May 31

Funds must be spent by July 31

Final Report Forms are due August 31

See ENF website for more details

Promise Grants

Do Not Need to Meet the Per-Member Giving Goal.

Awarded to the First 500 Applicants

Must be Youth Oriented

Promise Grants are \$2,500 grants available to the **first 500 Lodges** that apply for an eligible charitable youth activity.

They should follow each of the following objectives:

- **Active:**
 - Lodge members should be actively involved in the planning and execution of the project.
 - All funds should be used in direct support of the project and cannot be solely a donation of funds or supplies.
- **Engaging:**
 - Projects should give youth and Elks a chance to come together and should focus on serving youth who are at-risk or underserved.

Promise Grants are a great opportunity for Lodges to act as a positive influence in their communities by hosting projects that build the character and competence of local youth.

Due Dates:

Usually, the grant cycle begins July 1.

Only award 500

Must be spent before July 31.

Final Report Forms are due by August 31

Freedom Grants

Do Not Need to Meet the Per-Member Giving Goal

Focus on Veterans

Only 180 Projects are Funded

Are designed for Elks Lodges to hold projects that serve veterans and active-duty military members.

Are competitive

- Are awarded to Lodges whose projects are judged to best serve the needs of veterans and/or active-duty military members.
- Meaningful Elk involvement is strongly encouraged and increases chance of approval.
- Must focus on one of these five areas of increased need:
 - Employment
 - Homelessness and Housing
 - Military Families
 - Health
 - Educational Support

Due Dates:

Applications usually become available on July 1

Are usually due by July 31 at 12 p.m. (noon) Central Time.

Recipients are announced in September.

Must be used between September 2016, and July 31

Final Report Forms are due by August 31.

Community Impact Grants

Do Not Need to Meet the Per-Member Giving Goal

Up to \$10,000

Limited Number

Used for Large Scale Projects

Once an application is submitted, it cannot be edited.

Very Competitive

Must put in the work to get one.

Used to make a significant and meaningful difference in the community through a charitable project.

Used to fund a large-scale, ongoing service project—a project that will address unmet needs and inspire Lodge members to get involved and actively serve the community.

Please note that to be eligible for an Impact Grant, Lodges must be in full compliance with the Grand Lodge per-capita assessment, Section 16.010. This refers to Grand Lodge requirements and does not relate to the ENF.

Lodges should use Impact Grants for ongoing, Elks-led projects that address problems in Elks communities.

Intended to raise the Lodge's profile in the community and inspire new members to join a Lodge that's making a difference.

Due dates:

Application usually opens July 1

Has a hard due date (review the ENF Site for the date)

Usually Announced in late October.

Projects begin in January and end the following December