

# **Idaho State Elks Association State Secretary Handbook**



**Steve Meier,  
Ed Sanman III,  
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**Past State President  
Past State President  
PER, ISEA Secretary**

**2016-2017  
2013-2014  
2021 - Present**

**Updated April 2022**

# Idaho State Secretary

## Introduction

Congratulations!!!! You are the State Secretary for the Idaho State Elks Association (ISEA). I can honestly tell you that it is one of the most important positions in the state. Essentially, like Lodge Secretaries, you provide continuity to the State Association leadership and after one or two years in this position, have more history of decision making made by the state leadership. It is a huge responsibility. Further, with the Signing Board of Director's Member (Treasurer), you will also have a solid knowledge of the ISEA's fiscal standing.

Some individuals believe the State Secretary only takes minutes from the State Convention business meeting and nothing else. That perception is incorrect. The State Secretary not only needs to take minutes but update the state website, ensure all Grand Lodge correspondence is provided to the local lodges, ensure the appropriate state information is provided to the Grand Secretary's Office, State Sponsor, State President, plus other important individuals. The State Secretary also has an important role in ensuring the State President and Board of Director's submit appropriate documents to various entities **ON TIME.**

Now, a couple of points. As State Secretary, you represent **all** Idaho Elks. Consequently, as with other ISEA leadership positions, how you appear, behave, and the standards you set for yourself and others have significant consequences and impacts that reverberate throughout the association and how our state is perceived. You and the State President really are the face of the ISEA. You should always try to be the person that everyone looks to and to say: "This is how it should be done." I cannot tell you enough how humbling that should make you feel. Few members have sat in this position, and you always need to remember that humility. There is a saying in the Bible, "The last shall be first and the first shall be last." That is how you must **always** think. You need to place the desires of the membership, the goals and wishes of the organization above your own personal aspirations. If you do so and work hard, your aspirations will come to fruition and the honor and accolades you may desire will follow. In contrast, if you place your desires, wishes, and social aspects above the membership and needs of the association, none of the aspirations you desire will result. That is, you need to think both short and long term about how your decisions and work ethic will impact the state association.

While you engage in this process, there are no short cuts. Ultimately, homework and duties require you to allocate a minimum of 5-10 hours every week to perform your duties well. This number may change as you become more knowledgeable in your position. While you do not need to attend other social events, there will be Zoom as well as face to face meetings throughout the year. To be effective, you must work very hard and put in the time. Like we said, there are no short cuts.

There is one more important thing you need to remember: This position can eat up **all** of your spare time if you let it. If you have another job, the boss may be supportive. However, someone is paying you to do perform tasks for that company. Therefore, use

effective time management while in this position. If you keep your priorities right, your accomplishments will be remembered for a long time. Finally, despite the work, you will have a lot of fun in this position and can make positive and substantial impacts in many people's lives. There is nothing more rewarding than that.

So, for the remainder of the day, relax, enjoy your party, and allow others to be happy for you and with you. Tonight, at dinner, the work for you begins.

Steve Meier,	Past State President, Idaho State Elks Association, 2016-2017
Ed. Sanman III,	Past State President, Idaho State Elks Association, 2013-2014
Linda Tatlock,	Idaho State Elks Association State Secretary, 2021 – Present, PER

# Responsibilities

## 1. Assisting the State Leadership Team and Others

First and most importantly, understand while you work for the State Leadership, understand that you are under the direction of two individuals: The ISEA President and State Sponsor. These individuals are your boss. Any requests for you to do something needs should come through one of these two individuals. For the most part, you work directly with the State President. However, in some rare instances, the State Sponsor may ask you to do something. When this occurs, follow their instruction but make sure you contact the State President and get them in the loop.

As discussed previously and as a reminder, the second important responsibility while being the State Secretary is to remember that you assist the leadership, committee chairs and membership of the entire state. Thus, try to anticipate what the State President, ISEA Board of Directors, state committee chairs and general membership need or desire. That may be difficult considering there may be differences of opinion on various topics. Here is where it becomes difficult. In your position, you may have an opportunity to provide input to the ISEA Board of Directors on various issues. However, remember that final state decisions are made by the State President and Board with oversight by the State Sponsor. In your position, regardless of your opinion, you need to keep those discussions confidential. Further, you need to support those decisions in public or refrain from discussing them at all. However, that does not mean you must remain silent. As a member, you can provide input and question all state leaders within Board of Director's meetings or within sidebars. However, as a State Secretary, you need to be cognizant of when it is appropriate for those discussions and act accordingly.

## 2. Appearance and Pictures

### **Appearance:**

As a state official it is important that you always are dressed appropriately for the occasion. Remember, you are always on point. When in business settings, state business attire is required (described later). When in less formal social settings, dress appropriately, but ALWAYS dress to a level a bit higher than the general membership. For example, if blue jeans are appropriate, make sure they are newer, do not have holes, stains, etc. Always ask the State President what you should be wearing and what they will be wearing. Finally, in Grand Lodge situations, you should always be dressed in state business attire unless told differently regardless of what other states are wearing. Remember, you are representing Idaho state and we set and expect a higher standard from our leaders than many other states.

### **Pictures:**

Another reminder, when pictures are being taken, make sure to look behind you and also ensure adult beverages are behind you as well. Never have a cocktail visible in a photograph and always be careful when having dinner with beverages. For example, a glass of wine in front of you at dinner is appropriate, a bottle probably is not.

### **3. Elks National Foundation**

One aspect that you might need to discuss with others is the Elks National Foundation. Although you do not have a specific role in promoting the foundation (The Chair Officers have that role), you should understand how to submit donations, plus have knowledge about ENF grants, scholarships, etc. Specific grants are included within the Appendix of this document. So, know the deadlines, send reminder letters to Local Lodge Exalted Rulers and Lodge Secretaries, etc.

### **4. Time Needed to be Successful**

In general, your first year will be one of learning, training, and work and some social activity. As observed throughout this document, there will be numerous tasks that need to be accomplished. This takes time. For you at this stage, you need to allocate 5-10 hours per week or more to accomplish the required tasks. Do not get behind. Schedule specific periods of time in your calendar every week for just "Secretarial" stuff and remain consistent and persistent. Doing so will make it easier to get things done.

Being the State Secretary is serious business and you need to take it as such.

### **5. Equipment Needed**

Your first year will be the most expensive for the State Association. To be successful at this position, you will need to have good computer skills and equipment. If your equipment is older than four years, it is strongly recommended that you discuss purchasing:

- a. A solid-state 1TB laptop computer with a minimum of 16GB RAM, WIFI, RJ-45 connection (for direct internet connection), HDMI connection for projector or large monitor, PC Speakers, USB-c and USB-A/B. This machine will used only for ISEA work. Do not go cheap here. LG Gram, Microsoft Surface level computers are the level you need to purchase. The laptop should also have Bluet tooth capability. On the PC you may need a USB-C hub to connect printers, backup drives, thumb drives, etc. Newer laptops often don't have many external connections. With a hub, you only need to have one connection (plus power) to disconnect when you take the PC to a meeting.

You also need to purchase two 27 - 32 inch monitors that will be connected to your laptop for easy viewing. Need to make the computer can be set up for two monitors.

Ultimately, a laptop allows you to easily bring it to state conventions and other functions. Do not purchase a Chrome Machine or MAC. Regardless of your preference, MAC machines often have issues with some GL software as well as some MS software platforms. If you have vision issues, purchase a larger monitor that can be linked to the laptop.

- b. Basic Software to purchase: Window's 11 or better. Microsoft Office Suite (Word, Excel, PowerPoint, Publisher, etc.), Adobe Acrobat (You should not need Creative Suite).

You will also need:

The most recent version of QuickBooks or similar program promoted by Grand Lodge.

Antivirus software (Norton or Sophos level. Do not use the "Free versions.")

Backup Hardware and Software to be done weekly.

Team Viewer (Free Version is fine)

Zoom (with a paid Zoom account that should all day presentations if necessary.

A Password Manager (with the State President or State Board Chair having the Master Password.

- c. A Color Laser Jet Printer (NOT INKJET) with separate color and black cartridges. The cost savings in ink and print quality is why you want to go Laser. We suggest a machine that can email, copy, and Scan. Fax is optional.
- d. Cloud Account for additional backup as well as easy access to files off site.
- e. Other items identified by the previous State Secretary.
- f. Internet Connectivity  
You should have very good internet access and high-end router (Net gear Nighthawk level or better). It is best to have at least 100Mb or more download speed. Fiber is the best. Your cell phone should also be capable of accessing the internet.
- g. Email address specifically for ISEA business. You may be able to use the same one as the previous state secretary.

## 6. Other Equipment and State Manuals

As State Secretary, you will also be keeper of ISEA equipment for presentations. This equipment will be purchased and maintained by others, but you will need to store it and bring it to appropriate meetings.

In addition, there will be various state binders containing scripts for conventions and various rituals (Installation, Memorial, Dinners, GL Breakfasts, etc.) that you need to bring to various meetings as well.

## 7. Equipment Inventory

Currently, the ISEA owns a variety of equipment and will be purchasing additional training equipment shortly. You will need to keep an inventory of this equipment. This includes computer equipment, projection boxes, computers, and other items. The best way is for maintaining inventory is to develop a spreadsheet that includes the item, date of purchase, potential date for replacement, and individual who has control of the item. Note, individuals may transfer items as meetings move across the state. It is critical that you know where this equipment is at all times. Finally, note that there is also a storage unit maintained in Boise. Here various files, historical items and other materials are kept. Contact the historian and have them provide an inventory of the items held in that facility.

## **8. Correspondence**

One of the most important roles in your position is communication to others. This will include correspondence and reminders to state leaders as well as Local Lodge Secretaries and Exalted Rulers. Finally, you will need to correspond periodically with various Grand Lodge leaders and assistants. Part of this process will include the submission of appropriate reports to Grand Lodge. For this reason, you need to understand Grand Lodge correspondence protocols, address labeling, etc. This information is found in Appendix C\_\_\_\_. Need to Include

The State Association also has letterhead for both envelopes and paper. This material is found in Appendix \_\_D\_\_. Need to Include

In addition, you will need to send congratulations letters to all State Committee chairs and update contact information as needed. This information will need to be posted in the state website and notification of such sent to Local Lodge Secretaries.

Finally, you will need to preserve all books and documents of the association and provide appropriate materials to the State Historian when appropriate or requested. These materials will also be backed up into a Cloud Account maintained by yourself but accessible by the current State President. Consequently, each year, you and the incoming State President will need to modify appropriate passwords and administrative access.

The Secretary will also transfer all State Association property (records, equipment, software and the ISEA Association Seal, etc.) to his/her successor.

## **9. ISEA Website**

If no State Webmaster has been assigned, as State Secretary, you will be responsible for updating and posting various materials to the ISEA website. This site is hosted by Gravis Tech located in Wallace. The owners are Elk's members and their service and products are excellent. They have a variety of videos which will you learn and a practice site before you need to post things. They also have exceptional tech support.

Materials that will first need updating include Grand Lodge, State Association and Local Lodge Leader and committee information. Some of this material can be cut and pasted or directly downloaded from the GL website. Other materials for the website include ISEA convention schedules (received from the State Convention Coordinator), articles promoting the Association, etc.

You will also maintain the state association's webspace presence in FB and other social media platforms a weekly basis or as directed by the Idaho State President. This may require that you work with the state marketing, directory and other committee chairs as needed or required. Finally, if applicable, you may need to work with the state newspaper chair providing articles and other information.

A timeline for posting of materials will be shown later in the Calendar Section of this document.

## **10. Confidentiality**

One of the most important aspects of this position is confidentiality. Unless stated otherwise by the State President, all communication / comments you are party too should remain between you and the others involved. At no time should you share any information discussed within state board or other meetings unless open to the general membership. Often topics can very sensitive and ultimately cause confusion, friction and/or hurt feelings amongst the membership or specific individuals. The appropriate person to share this information with the membership is the State President or Board of Director's chair. This also means that for some topics, even a discussion of the issue (especially specific members) with your spouse is inappropriate. Generally, if you believe you should not discuss or disclose something, do not discuss it with others.

## **11. Sensitive Topics or Issues**

At times, members or spouses may come to you to discuss an issue. When this occurs, listen politely, then refer them to the State President or District Deputy for potential action. While you are a sounding board, you should not be the person trying to resolve an issue unless directly related to your position (e.g., updating membership information). Further, in some cases, being involved can place you at risk to being subpoenaed when a GL or other legal action occurs.

The one exception is verbal, sexual, or physical abuse or harassment. When this occurs, you **MUST IMMEDIATELY** inform a Grand Lodge District Deputy, Special Representative, or similar GL member in attendance. Under no circumstance should you try to resolve the issue. Instead, listen, gather information, then encourage the person to contact the appropriate Grand Lodge leader. Regardless of what the person decides to do, you must cue the appropriate leadership to protect yourself, the State Association and Grand Lodge. When such events occur, there are very specific investigative protocols that must be implemented to address the issue while trying to protect the individual involved, State Association and also Grand Lodge.

## **12. State Association Seal**

As with local lodges, the ISEA has a state seal. You will be responsible for maintaining this seal in a secure location.

## **13. Minutes:**

As Secretary, you will need to attend all meetings of the association and shall keep a true record of the proceedings of such meetings. These meetings could include: State Association Board of Director's meetings, committee meetings, state convention meetings and others as may be directed by the Idaho State Association President.

As part of this process, you can use audio or video recordings to assist you. Notes / minutes of such meetings will be presented in electronic format to the appropriate



meeting chair and / or members within two weeks following such meetings unless directed differently by the Idaho State Association President or committee chair.

Notes / minutes for State Convention business sessions will be presented in electronic format to ISEA Local Lodges, the Idaho State Association President and Officers, State Historian, Special Deputy (if appropriate) and/or State Sponsor within three? weeks following the convention. (we should talk about this.)

Make sure you delete all audio recordings unless directed otherwise by the State President. At a minimum, ensure they remain in a safe place.

#### **14. Materials for Grand Lodge**

When directed, you shall need to send to the Grand Exalted Ruler, Grand Secretary Chair of the Grand Lodge Fraternal Committee the following:

- (a) Copies of the Constitution and By-Laws, rules and regulations and all ISEA amendments and changes.
- (b) A written or electronic copy of the proceedings of each meeting or reunion.
- (c) All printed documents issued by the Grand Lodge Secretary's office or other Grand Lodge offices.
- (d) A correct list of officers, lodges, committee chairs and other individuals within the State Association and lodges including post office addresses and email addresses and other requested information. Most of this information will be submitted through the CLMS system. It should be updated on a quarterly basis if appropriate.
- (e) A copy of the annual report of the treasurer or signing chair if appropriate.

#### **15. Government Reports, Insurance and Notifications**

As part of your responsibilities, you will need to ensure that appropriate individuals have submitted the following documents EACH YEAR:

- a. IRS 990 & 990T.
- b. IRS /Idaho payroll reports (if applicable) are filed on time.

Both Items A and B should be easily accessible via Quick Books or other approved GL program. Part of this process may include using the FRS system.

- c. Annual Corporate Report with the Idaho Secretary of State.
- d. Notify Idaho Secretary of State of any ISEA Board of Director changes (may be part of item c). Should be done immediately following the ISEA summer convention.

## **16. State Convention or Winter Training Session**

At this time, the ISEA has two convention coordinators who ultimately have complete control over the layout, timing, and other aspects related to the state convention and Winter Training Session. These individuals work directly with the State Sponsor, State President, Business Practices and Convention Sites Committee. Currently, this person also coordinates with lodges holding the state conventions. They ensure appropriate speakers are identified, accommodations and fees are addressed, meeting rooms are adequate, projection boxes, internet connectivity, computer / Zoom access can occur, sound systems are integrated, etc. This person also sets the schedule for the various meetings and provides appropriate scripts for the appropriate participants including State Association Leaders.

Approximately, two-three months prior to an event, the convention coordinator will submit the Registration Cover sheet including hotels etc. to you for the convention. This will need to be posted to the ISEA website and emailed to all Lodge ERs and Secretaries as well as state leaders and committee chairs. This document will also be emailed to the Presidents and State Secretaries of all states within Area 8.. When Business meetings will be held, all chairs will submit a written report to you no later than one month before the event. This document is to be posted in the ISEA website and saved in a file for the final convention report.

In addition to these activities, you should contact the ISEA President for an agenda to be given to the appropriate individuals one week prior to the meeting.

## **17. State Directory**

At this time the ISEA state directory is managed by the State Directory Chair. However, you should double check all contact information in the directory for the State Officers and Committee chairs, not all committee members. This information can also be obtained from CLMS. This information should also be checked in the ISEA website.

## **18. Travel**

At this time, the State Secretary is required to attend the following events:

- State Summer Convention
- State Winter Training Session
- April Officers Meeting with the State Sponsor (if held)
- Other events required by the State President

Consequently, you need to identify where various events will be held in the spring of the current fiscal year. Then provide potential costs for mileage, hotel, and related expenses to the INCOMMING State President for inclusion in their final budget.

## **19. Other Activities.**

The Secretary will also perform such other duties as are properly required and usually performed by Secretaries of similar states. This may include:

Perform monthly bank reconciliation for all accounts.

Monthly posting of the ISEA investments.

Quarterly Profit & Loss and Balance Sheet to State Sponsor.

Mail out State Association dues notice in March to all Idaho Lodges.

Prepare for and attend semi-annual Financial Review.

Submit appropriate vouchers for all expenditures to approving Trustee.

Prepare all documentation for accountant on an annual basis.

Ordering name badges.

Maintaining office supplies.

Sending by-law changes to Local Lodge Exalted Rulers and Lodge Secretaries.

Sending budget request forms to State Officers and Committee chairs.

Submitting appropriate forms and materials to Grand Lodge, IRS, or other agencies.

Contacting lodges for Per Capita State dues.

Other tasks as directed by the State President.

## Calendar Page / Things to do

### June

- a. Make an Excel Spreadsheet
- b. Contact all ERs and Lodge secretaries. Provide contact information, get on their mailing lists, etc. and place information on the spreadsheet. You can get this information from Elks.org. (See Appendix A, Section 10, Exports)
- c. Get your framed picture to the local lodges in your district.
- d. Learn about State Grants.
- e. Send a letter to the ERs and Lodge Secretaries regarding all state grants. See Appendix B.
- f. Learn about ENF grants. Information about grants is provided later in this document.

### July

#### Following the Grand Lodge Convention

- a. Contact the DD. Identify the time and location of the DD clinic.
- b. Place DD meeting times and locations on the website.
- c. Contact the State President and have them give you their schedule for visitations. Place President's visitation information on the website.
- c. Learn more about the association, duties of different groups, review committee manuals from the GL website, etc.
- d. Email ERs and Secretaries regarding state grant deadlines.
- e. Send appropriate minutes to state officers for review, approval and sending to the lodges if appropriate.

### August

- a. Need to enter state committee chairs and directory information in the Secretary Section of the Elks.org website. See Appendix A to enter the Grand Lodge State Secretary's site.
- b. Contact State BOD members and remind them to schedule their rooms for the Winter Training Session. Also schedule a room for yourself.

### September

- a. Send a letter to lodges regarding the Winter Training Session.
- b. Send a letter to ERs regarding the Eleventh-Hour Toast and Flag contest.
- c. Contact the Winter Training Coordinator for room assignments, times, etc.
- d. Send a letter to the State Newspaper Coordinator (if appropriate).
- e. Contact State BOD members and again remind them to schedule their rooms for the Winter Training Session if they have not done so..

### October

- a. Send an email reminder to Lodge Leading Knights regarding the Winter Training Session.

## November

- a. Attend the Winter Training Session
- b. Take minutes as appropriate
- d. Update State Fees (if appropriate) for State dues. Include information State Secretary Website if needed.

## December

- a. Make reservations at the convention hotel for the Idaho State Summer convention. Remind the BOD members to make their reservations as well.
- b. Send appropriate minutes to state officers for review, approval and sending to the lodges if appropriate.

## January

- a. **Contact and get the new committee assignments from the First VP when they are available.**

## February

- a. Attend the State Hoop Shoot if held in your district.
- b. Send a letter to State Committee Chairs and committee members regarding their committee assignments.

## March 1

Send a letter to the new ERs. Identify when their installation will be done and location.

## March

- a. Send a letter to the State Newspaper (if appropriate).
- b. Send a congratulations letter to the new ER for the ER and their officers.
- c. Send dues notices to Lodges.

## April

- a. **SUBMIT THE STATE CHARITY REPORT TO GRAND LODGE BEFORE APRIL 29**

## May

- a. Take a break.
- b. Review scripts for the June Convention.
- c. Make a final report to be read on the convention floor.
- d. Newly elected BOD members can be added after installation in June.

## June

- a. Attend the State Convention.
- b. Submit the newly elected GOD members to GL State Secretary's Website  
Make any addendums to this document and include them in this manual.

File annual report to Secretary of state's office. Due date May 31

Make sure 990 is submitted on time. Provide information to State Accountant, Ann Swindell, Clifton, Larson, Allen.

Update website on a weekly basis or as needed

## Final Remarks

As you have probably noted, there are a variety of tasks to accomplish as State Secretary. While it may at first appear overwhelming, after you get your feet wet a bit and follow the general calendar, it will settle out. Remember, you were selected for this position by individuals who believed you would be an ideal person for the position and the State Association. So, we have extreme confidence in your abilities and decision making. However, if you are overwhelmed, confused, tired, etc. about the workload or other aspect, contact the State President and identify a solution. Remember about the three important things in life and their importance.

Finally, understand that you are not alone in this adventure. There are several State Secretaries from surrounding states who have been in this position (sometimes for several years). They have a lot of expertise and can give you guidance and mentorship. In addition, there are numerous individuals at Grand Lodge who will be happy to help you as well. These include the Grand Secretaries Office personnel, CLMS coordinators, GL committee chairs, just to name a few. All you need to do is ask.

So again, congratulations in this position. We are confident you will be successful and be a fantastic leader in our association.

Steve Meier,	Past State President	2016-2017
Ed Sanman III,	Past State President	2013-2014
Linda Tatlock,	PER, ISEA Secretary	2021 - Present

# Appendix A

## Using the State Secretary Elks.org Website

The following information are instructions for various aspects while working in the GL website.

1. All information you access from the elks.org websites **MUST** be considered CONFIDENTIAL and only used for Elks purposes. Thus, if you need to store something from this site, save it in the cloud, NOT ON YOUR COMPUTER (in case it gets stolen).
2. If you don't already have an elks.org user id/password, you will need to create one.
  - a. Go to [www.elks.org](http://www.elks.org) and click on "Register" (upper right corner)
  - b. Read through the Terms of Service and at the bottom click on "I accept these terms. Please proceed to registration"
  - c. You will need to enter the following data items (mandatory): First Name, Last Name, Lodge Number, Member Number, Desired Username (your login id), a Password (8 characters, mixture of Upper/Lower case letters and 1 digit (0-9)), a valid email address (your own, not the Lodge's or someone else's) and a Security Question/Answer.
  - d. There are several other optional fields. Check over your answers and if correct press the "Create My Elks.org Account" Button. There may be a time delay before your account is activated.
3. To access the State Secretary Website, go to [www.elks.org](http://www.elks.org) and hover your cursor over the "Members Only", this will bring up a dropdown list, click on "Extended Access". This will bring up the Members Login Screen. Enter your Username and Password and press "Login". You will now be in the Extended Access Page, click on "State Secretary".

The screenshot shows the Elks.org website interface. At the top, a red navigation bar contains links for ELKS HOME, WHO WE ARE, OUR PROGRAMS, ELKS NATIONAL FOUNDATION, and MEMBERS ONLY. The MEMBERS ONLY link is highlighted with a green box. Below the navigation bar, a breadcrumb trail reads "Elks Home > Members Area >". The main content area is titled "Extended Access & Resource Centers" and displays the user's name as "User: Edward Sanman". Below this, a message states: "The links below represent the 'extended access' groups to which you're currently assigned. Scroll down on this to [view all extended access groups](#)." A list of links follows: Members, Secretaries, DDGERS (including PDDs), DDs (Current), CyberAssistants, SDGERS, State Secretary (highlighted with a green box), CLMS Coordinators, and Lodge Bylaws Coordinators. On the left side of the page, a blue sidebar menu lists various sections: Who We Are, What We Do, How To Join, Grand Lodge, Member Resources, Extended Access, Extended Access Center, Newsletter Dashboard, and Drug Awareness Center.



4. You will now be in the State Secretary site of elks.org:

ELKS HOME WHO WE ARE OUR PROGRAMS ELKS NATIONAL FOUNDATION MEMBERS ONLY

State Secy Home (ID) Home / State Secretaries / State Secy Home

## State Secretaries

**State Association Questionnaire Now Online! New!**

The State Association Directory Questionnaire - formerly submitted via email or postal mail - is now online. Our new submission system will greatly streamline the process of submitting your Lodge Officers and Committee Chairs to Grand Lodge. Please review our [detailed submission instructions](#).

- [Update State Association Fees](#)  
If your State Association fees have changed, please submit this online form to automatically update the state fees charged through CLMS.
- [How to create an alphabetized State Association Directory](#) (Instructions by Sharon Kirchner)  
Instructions for using export files to create an alphabetized directory for your State Association have been developed by Sharon Kirchner, [skirchner@sharperdesigns.com](mailto:skirchner@sharperdesigns.com). Questions may be emailed to Sharon; the CLMS2 Help Desk will be unable to assist in the development of your Directory.

5. On left side you have a menu with the various State Secretary tasks and access to various Grand Lodge Reports.
6. The State Association Questionnaire is used to submit: (Read the online instructions)
- a. State Officers (**deadline 6/1/20xx**): Since the ISEA Officers are elected just after 6/1/20xx, before 6/1/20xx, enter the new President, 1<sup>st</sup> and 2<sup>nd</sup> VP, continuing State Trustees and State Secretary. After the election of officers, you will know who the 3<sup>rd</sup> VP and new Trustee are. You can then “Update Your State Association Officers via this website (read online instructions).
  - b. State Committee Chairs (**deadline 9/1/20xx**): Get from the new State President.
  - c. Directory Information (**deadline 9/1/20xx**): Convention Dates, state project info, and other data about your State Association. NOTE: Contact your State Project leader to collect the necessary information well before the deadline.
7. Update State Fees: (**deadline 12/1/20xx** to be effective 4/1/20xx of new lodge year.
- a. State By-Laws need to be revised. Follow standard procedures.
  - b. Note: By-Laws changes (Dues) are not effective until submitted and approved by the Grand Lodge Judiciary.

ELKS HOME WHO WE ARE OUR PROGRAMS ELKS NATIONAL FOUNDATION MEMBERS ONLY

State Secy Home (ID) Home / State Secretaries / Update State Fees

## Update State Fees

If your State Association Fees have changed for the upcoming lodge year, please submit the form below to update the Chicago Lodge Membership System (CLMS) records for all the lodges in your state.

There is no need to submit this form if your State Association Fees are unchanged.

**Idaho State Elks Association Fees  
for 04/01/2022 through 03/31/2023**

**State Assn:**

ID

**State Fee:**

5.50

8. Appoint Assn. Staffer: The State Secretary (solely at State Secretary discretion) may appoint another Elks member to have FULL access to State Secretary elks.org website.
9. 60-Day Reinstatements: This gives you a report of the 60-day reinstatements that have occurred in your State between April 1 and May 30. Print this out and use it as a check list to make sure that the Lodges remit the full State Fees for each member that use this special reinstatement.
10. State Charity Report: (**deadline 5/1/20xx**). This is for 4/1/20xx through 3/31/20xx. On the Grand Lodge Manuals site, there is a manual for how the Charity Report works. There is a special page there for State Associations (**see Appendix B in this manual**). The State Charity Report should NOT include events that are being reported by the local Lodges. (See Exhibit "A") This information should be gotten from the IER, ISEY Inc and ISEA. These should not include monies received from ENF. <https://www.elks.org/grandlodge/charity/state.cfm>
11. Grand Lodge Reports. This shows all the Reports that are available. Some are restricted to certain levels of Elkdom. **Notice the last section is for State Secretaries only.** There are 7 sections of reports:
  - a. Membership Reports
  - b. Lodge Data Reports
  - c. Financial Reports
  - d. Charitable Reports
  - e. District Deputy Reports
  - f. Honor Roll Reports
  - g. Exports (State Secretary Only)

# Membership Reports

## Membership Statistics

- [Annual Membership Reports](#)
- [November Membership Reports](#)
- [CLMS2 Membership Snapshots](#)
- [CLMS2 Membership Projections](#)
- [Five-Year Membership Trend](#)
- [Lapsed Membership Totals](#)
- [Annual Membership Variance](#)
- [Lost 'N' Found Ratio](#) **New!**
- [Membership Retention Index](#) **New!**
- [Delinquent Ratio](#) **New!**
- [Candidate Ratio](#) **New!**

## Membership Inquiries

- [Membership Inquiries through Elks.org](#)

## Membership Dues

- [Per-Capita Dues Report](#) (PGERs Only)

## Necrology

- [Elks Necrology](#)

# Lodge Data Reports

## CLMS

- [CLMS2 Status Reports](#) (Coordinators & DDs only)
- [CLMS2 Lodge Info Reporting Status](#)
- [CLMS2 Lodge Dues Report](#) (GL Dues/Fees)
- [CLMS2 State Fees Report](#) (State Association Fees)

## Expelled, Suspended & Rejected Members/Candidates

- [Expelled Members \(by State or District\)](#)
- [Suspended Members \(by State or District\)](#)
- [Candidates Rejected \(by State or District\)](#)

## By-Laws

- [By-Laws Status Report](#)

## Miscellaneous Local Lodge Data

- [Lodge Dues Summary](#)
- [Average Meeting Attendance](#)
- [Elks.org Online Usage](#)
- [Average Secretary Salary](#)
- [Lodge Zip Code Jurisdiction by State](#)

# Financial Reports

## Auditing and Accounting Committee Financial Summary Reports

- [Auditing & Accounting Lodge Financial Evaluation Reports](#) (PGERs, GLA/A Committee Members, SDGERs, District Leaders, DDs, PDDs, ERs and Secys only)
- [Auditing & Accounting Lodge Financial Evaluation Report Overview](#) (PGERs, GLA/A Committee Members, SDGERs, District Leaders, DDs, PDDs, ERs and Secys only)
- [Lodge Profit/Loss Summary](#) (PGERs, GLA/A Committee Members, SDGERs, District Leaders, DDs, PDDs only)

## CLMS Transactions

- [CLMS Transaction Recap Report](#) (PGERs, GLA/A Committee Members only)

# Charitable Reports

## Local Lodge Charitable Giving

- [Local Lodge Charitable Reports](#)
- [State Association Charitable Reports](#)
- [Pending Charitable Reports](#)  
*(Data saved on elks.org but not yet submitted to GL.)*
- [State Association Charitable Reports Summary](#)
- [Charitable Reports Program Drill-Down](#)
- [Charitable Reporting Multi-Year Summary](#) **New!**

## Veterans Affairs Voluntary Service (VAVS) Reports

- [ENVSC VAVS Report Submissions](#) (PGERs only)

# District Deputy Reports

*(PGERs, SDGERs, District Leaders, DDs, and PDDs only)*

- [DD Visitation Reports](#)
- [DD Inspection Reports](#) (PGERs, SDGERs, District Leaders, DDs, PDDs and State Accident Prevention Chairs only)
- [DD Audit Reports](#)
- [DD Clinic Attendance Reports](#)
- [DD Grand Lodge Session Attendance Reports](#)
- [DD Visitation & Clinic Dates](#)
- [DD Visitation Summary Report](#)
- [Missing or Incomplete Visitation, Inspection, Audit and Clinic Reports](#)

# Honor Rolls

## Membership Promotion

- [Top Membership Proposers](#)

## Training

- [Lodge Officer Training Honor Roll](#)
- [Lodge Secretary Training Honor Roll](#)
- [District Deputy Training Honor Roll](#)
- [Board of Directors, Lodges Trustees & House Committee Training Honor Roll](#)

# Exports

## Delinquent, Dropped & Deceased Members

*(PGERs, State Secys, State CLMS Coordinators, and State Membership Chairs only)*

- [Export State Delinquent Members](#)
- [Export State Dropped Members](#)
- [Export State Deceased Members](#)

## State Directory Information

*(PGERs, State CLMS Coordinators, and State Secys only)*

Instructions for using the export files below to create an alphabetized directory for your State Association have been developed by Sharon Kirchner, [skirchner@sharperdesigns.com](mailto:skirchner@sharperdesigns.com). Please [review these instructions](#) prior to accessing the files below. Questions may be emailed to Sharon; the CLMS2 Help Desk will be unable to assist in the development of your Directory.

**[How to create an alphabetized State Association Directory](#)** (Instructions by Sharon Kirchner)

- [Export Active Members](#)
- [Export State Lodge Information](#)
- [Export State Officers & Committees, w/ contact info](#)
- [Export Lodge Officers & Committees, w/ contact info](#)
- [Export Distinct State and Lodge Personnel, w/ contact info](#)
- [Export ERs, w/ contact info](#)
- [Export PERs, w/ contact info](#)

- A. For example. If you want a list of the **current** Est. Leading Knights for your state, from the Grand Lodge Reports screen, you can “Export Lodge Officers & Committees, w/ contact info”. This will download an Excel spreadsheet (.csv file) with all the information into the PC “Downloads” folder. You can then sort the Excel spreadsheet by Officer Title (column heading is “OFFICECOMMITTEE”). You will have their names, addresses, phone #s, email addresses, Lodge #, Lodge Name.
- B. MAIL LIST for ALL LODGE MEMBERS in your State. From Grand Lodge Reports screen, download “Export Active Members”. This will give you an Excel spreadsheet that can be used for a mail merge. If you to sending this to an outside source, like the publisher of your State Newsletter, DELETE all columns except those absolutely needed for the mailing (or emailing).

12. Grand Lodge Manuals. These are all the manuals that are available online. Most of PDF files that you can download. There are many manuals for lodge committees. These are also useful for State Committees. To access, hover cursor over "Extended Access" (will dropdown a list) and click on Manuals.

13.

The screenshot shows the ELKS website interface. At the top, there is a navigation bar with links for 'ELKS HOME', 'WHO WE ARE', 'OUR PROGRAMS', 'ELKS NATIONAL FOUNDATION', and 'MEMBERS ONLY'. The 'MEMBERS ONLY' link is highlighted with a red box. Below the navigation bar, the main content area is titled 'State Secretaries'. A sidebar on the left contains various links, including 'State Secy Home (ID)', 'Home', 'Update State Fees', 'Appoint Assn. Staffer', '60-Day Reinstatements', 'Directory: Officers', 'Directory: Chairs', 'Directory: Assn. Info', 'State Charity Report', 'Grand Lodge Reports', and 'Extended Access'. The main content area features a 'State Association Questionnaire Now Online! New!' announcement and a list of links: 'Update State Association Fees', 'How to create an alphabetized State Association Directory', and 'Lodge Accounting'. A right-hand navigation menu is visible, containing links such as 'Members Home', 'Officers & Committees', 'Newsletter', 'Reports', 'Manuals', 'Membership Toolkit', 'National Convention', 'Elks Magazine Online', 'Lodge Accounting', 'Extended Access', 'Lodge Secretaries', 'Message Boards', 'Licensed Vendors', 'Classifieds', 'By-Laws Revision', and 'Safety & Insurance'. The 'Manuals' link in this menu is highlighted with a green box.

## Manuals Available (4/12/2022):

**Virtual Manuals:**  
Membership Guide  
Marketing Guide

## PDF Manuals:

### **Accident Prevention**

Accident/Claim Prevention  
Liability Insurance Program Book  
Property Plus Program Guide  
Responsible Beverage Service  
Self-Inspection Form

### **Activities Committee**

Planning a Special Event  
Soccer Shoot Manual  
Youth Activities Programs Manual  
Youth Supervision Guide

### **Auditing and Accounting**

Auditing and Accounting Manual  
Financial Reporting System (FRS)  
Manual

### **District Deputies**

District Deputy Manual

### **Drug Awareness**

Elks Drug Awareness Manual

### **Elks and Scouting**

Elks and Scouting Managing  
Guidelines

### **Elks National Veterans Service**

#### **Commission**

ENVSC Manual for District  
Deputies  
ENVSC Volunteer Service Guide  
Lodge Veterans Chair Welcome  
Guide

### **Fraternal Committee**

About Our Flag  
Americanism Manual  
Lodge Activities Manual

### **Government Relations**

#### **Committee**

Government Relations Manual

### **Grand Lodge**

Discrimination and Harassment  
Guide for Local Lodges  
Emblem Usage Guidelines

GL Program 2021/22  
Grand Lodge & State Association  
Directory

Manual on Protocol

### **Hoop Shoot**

How to Stage a Successful  
HoopShoot

### **Internet**

Elks.org User Manual  
How to Register for Elks.org  
Virtual Home Page Owner's  
Manual

### **Judiciary Committee**

Annotated Statutes  
Courts of the Order Exhibits  
Guides for Board of Directors  
Guide to the Courts of the Order  
Mediator's Guide

### **Local Lodge**

ERs, Officers & Committee  
Members Manual  
House Committee Handbook  
Investigation Interview Committee  
Manual

### **Public Relations Committee**

Developing New Elks Lodges  
Membership Program & Planning  
Manual  
Public Relations and Media  
Handbook

### **Ritualistic Committee**

Ritualistic Manual  
Rituals of Special Services  
Rituals of the Local Lodge  
Word Accuracy Guide

### **Secretaries**

Charity Workbook  
Manual for the Secretary of an Elks  
Lodge



## **Appendix B**

# **State Association Charitable Reporting Guidelines**

The following is a guideline for all State Association Officers, Committee Members, District Officers and Association Members in general to help in uniformity of reporting.

On or before May 1 of every year, the State Association must fill out page two of the online Annual Report form listing all donations, hours, expenses and mileage, from Elks and non-Elks. Here is the link: [www.elks.org/members/statesecys/StateCharityReport.cfm](http://www.elks.org/members/statesecys/StateCharityReport.cfm).

This list will assist in the reporting and enable all State Associations to report the same items nationwide. These suggested categories are not intended to be the only reported items as every State Association may have other entries to report as well. Instead, they serve as a starting point and can be added to according to need:

1. Total mileage to and from functions, meetings, Lodge visits and all other Elks involved visitations, of a charitable nature.
2. Total hours spent traveling to meetings, functions, Lodge visits, etc. for charitable purposes.
3. Total hours spent planning for, working on and attending above-mentioned events.
4. All Elks-related long distance phone charges and postage for charitable purposes.
5. Major Project income and budget amounts not reported by individual Lodges.
6. All charitable donations at the District or State level.
7. All out-of-pocket monies or Association-supplied budget funds expended for charitable purposes.
8. Monies collected from charitable fundraisers.
9. Miscellaneous items as required.

It would be beneficial to request these items quarterly with the final reporting by committee members before April 15. This will allow you time to compile the report and submit it to the Grand Secretary by May 1 at the [elks.org](http://elks.org) link listed above.


# Appendix C


## This Information was Obtained from the GL Website.


### Use the Following as a Guide

#### Ways to Address Envelopes

##### Grand Lodge / Past Grand Exalted Ruler

Idaho State Elks Association 1234 My Street Hometown, USA	
Hon. T. Keith Mills, P.G.E.R. B.P.O. Elks Insert Address Insert State and Zip Code	

Idaho State Elks Association 1234 My Street Hometown, USA	
District Deputy Grand Exalted Ruler Sally W. Smith Insert Address Insert State and Zip Code	

Idaho State Elks Association 1234 My Street Hometown, USA	
James Q. Smith, Vice President North District Insert Address Insert State and Zip Code	

## PROPER FORMS OF ADDRESSING ENVELOPES

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

Members of the Order are not referred to as “Mr. or Mrs.” And never **use nicknames nor titles** such as “Dr.”

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

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

***(Does not apply to the Grand Chaplain or to the Administrative Assistant to the Grand Exalted Ruler)***

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

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

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

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

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

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

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

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

***Past members of the Grand Board of Trustees and the Grand Forum should be addressed as above with “Past” in front of their title.***

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

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

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

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

(Name), D.D.G.E.R.  
(State) South District

(then 2-line address)

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

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

(Name), S.D.G.E.R.

(State) South District

B.P.O. Elks

(then 2-line address)

***Special Deputies do not carry the word "Hon."***



**Idaho State Elks Association**

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**Idaho State Elks Association**