

Idaho State Elks Association State 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

Idaho State President Exalted Ruler Position

Introduction

Congratulations!!!! You made it!!!! You are now the President of the Idaho State Elks Association. Your position now represents the Exalted Ruler's role whose motto is "Fidelity." Some individuals believe that being President is primarily social and that you are a figurehead for the association. In some sense that is true. You are the figurehead of the association and have required social and protocol obligations. **However, being State President is significantly more than that.** Frankly, you now represent **all** Idaho Elks. Consequently, how you appear, behave, and the standards you set for yourself, your Vice Presidents, committee chairs and others have significant consequences and impacts that reverberate throughout the association and how our state is perceived.

Fidelity has many implications that you as State President need to consider. Performing this job well requires responsibility and devotion to the state association, faithfulness to the members who look to you for guidance and assistance, commitment to ensuring that the membership will be proud of everything you do, and a standard that other states look to as a flag bearer. Fidelity also implies attentiveness, dedication, and zeal to a standard that your Vice Presidents should want to emulate. That is, as Idaho State President and future Past State President, you should always try to be the person that everyone looks to and to say: "This is how it should be done;" "The state leadership really knows what they are doing;" "This leadership team really knows how to get things accomplished."

Today the members have honored and installed you as Idaho State President; one of responsibility and respect. For this honor, I cannot tell you enough how humbling that should make you feel. Few people have sat where you are 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; even when required by protocol to do the opposite. You need to place the desires of the membership, the goals of the organization, and the wishes for the future above your own personal aspirations. If you do so and work hard, your aspirations will come to fruition and the honor and accolades you 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.

As your responsibilities have increased, your attention to the Elks and the state association has also increased. By now, you know everything about how the trustees, state project, state association and its committees work. As First-Vice President and

now as President, you must consider aspects for your current Presidential year plus the impacts of your decisions during the following 20 fiscal years. That is, you need to think both short and long term about how your decisions impact the state association.

As discussed before, while you engage in this process, there are no short cuts. Everything you say, everything you vote on, and everything you do directly impacts the membership and what the association stands for now, and in the future. Further, now you are the CEO of a state organization with a multi-million-dollar state project and other million-dollar accounts. Unlike when you were a Vice President, and even though you have Board of Director's members to help you, frankly, you are now responsible for everything! The news media do not go to the committee chairs or board members, they call you if a problem is identified. It is a major responsibility and one that must be taken extremely seriously.

Now that you are President, your responsibilities significantly increase. You have committee chairs to be in constant contact with, reports to review, etc. Ultimately, your homework and duties require you to allocate a minimum of 10 hours every week to perform your duties well. You also need to attend the Idaho State conventions and trainings, DD clinics, state project meetings, hoop shoots, other state conventions and the National Convention as well. 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 was discussed when you became a Third VP. Remember, God and Family come first, then the State Association. This position can eat up **all** spare time if you let it. You may also have a job. Although the boss may be supportive, someone is paying you to do perform tasks for that company. Therefore, use effective time management while in this position, take care of your spouse and kids, and take care of yourself by eating right, getting good sleep, taking vitamins, working out, and keeping alcohol consumption to a minimum.

If you can do these things and 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

Responsibilities

1. The Membership

As discussed previously and as a reminder, the first and most important responsibility while being State President is to remember **at all times** that you represent the membership of the entire state. That is, you are always on point whether in your own lodge, at state conventions or in public.

As President, you represent the station of the Exalted Ruler whose motto is "Fidelity. As discussed earlier and repeated here, Fidelity requires responsibility and devotion to the state association, faithfulness to the members who look to you for guidance and assistance, and commitment to ensuring that the membership will be proud of everything you do. Fidelity also implies the attentiveness, dedication, and zeal to a standard that your Vice Presidents should want to emulate. That is, as the Idaho State President you should be the person that everyone looks to and says, "This is an exceptional leader."

Pictures

Another reminder, when pictures are being taken, make sure you look behind you and ensure adult beverages are always behind you as well. Never have a cocktail visible when taking pictures and always be careful when having dinner with beverages. Although you may have been a bit slack as a Vice President, now it is critically important: Especially, in any business type meetings you attend. Alcohol has no place where important decisions should be made regardless of the quantity.

Reflect on this scenario. The State Officers and Trustees make some decision with you as President to sell or purchase a major piece of property. Someone disagrees with the decision and decides to sue the association for that decision. If you, or others have been consuming alcohol and there are pictures of you doing it, consider what the opposing attorney will do when you are on the stand and implying that you and others were impaired by alcohol when making that decision. Remember, thoughts, opinions, or good reasons are important, but perceptions and impressions outweigh everything.

2. State Project

1. As President, you and the ISEA Board of Directors are the "non-voting members" of the Idaho Elks Rehab Corporation and as such, the State President may get to appoint members of the IER corporation's Board of Directors (with the advice and consent of the other ISEA board members and state sponsor. While the IER Board of Directors directs the corporation, it is your responsibility to keep on top of the actions, direction and status of the IER.

2. You also need to ensure you are promoting the project with your Vice-Presidents throughout the state. Thus, send reminders to all Exalted Rulers and Lodge Secretaries about various initiatives, tell others about the project, etc.

3. Elks National Foundation

In addition to the State Project, you need to promote ENF donations, grants, scholarships, etc. You have reviewed these documents over the past three years and again, they are again included within the Appendix of this document. So, know the deadlines, send reminder letters to the Exalted Rulers and Lodge Secretaries, etc. You also need to promote the Grand Exalted Rulers per capita goal and encourage all members and lodges to donate to ENF.

4. Time Needed to be Successful

As indicated earlier, this year is one for lots of work and some social activity. 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 10 hours per week or more to accomplish the required tasks beyond your visits and various functions. Do not get behind. Schedule specific periods of time in your calendar every week for just "Presidential" stuff and remain consistent and persistent. Doing so will make it easier to get things done.

Being the State President is serious business and you need to take it as such. Again, this position is more work than social. You represent the membership of the association, have major responsibilities for multi-million-dollar projects, plus you need to complete a lot of other tasks.

5. Reports Section in the Grand Lodge Website

The reports section is critical for you to review **monthly**. Pay close attention to delinquencies, ENF donations and numerous other reports. Again, three key reports are the 5 year trends report, the lapsed membership totals, and Membership Snapshots reports.

6. Budget for your Presidential Year

You will be expending funds throughout your Presidential year. Right now, depending on your budget, you have about \$30,000 to spend on a variety of budget items. Use these funds for visitations, and other tasks. Do not spend funds from your own pocket unless absolutely necessary or outside of the requirements for the association. If necessary, contact the Board of Directors to discuss this issue.

Make sure you keep all receipts. Make a folder and put only those receipts for one trip in each folder. This will make easier accounting after the fiscal year is complete. Work directly with the board member responsible for managing budgets.

Out of State Presenters: Be sure to allocate funds for Out of State presenters if possible at the Winter Training Sessions (pay their registration and hotel room). Grand Lodge committee members on official visits to states are paid a per diem by GL. However, you or the host lodge will need to complement their registration.

7. Other Spending This Year

Some things you should spend your own money on if desired.

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, but make sure you do not forget it.

Private parties for Visiting Dignitaries: During the Winter Training Session, and Summer Convention, you may desire to have a function for out of state dignitaries and past state presidents. This event should be held off site and done quietly. Allocate \$200 for food and adult beverages. Don't be cheap here. Have mid or top shelf beverages only: **No Bottom Shelf Products**

Gifts for your State Secretary, Spouse, and Others. You may want to purchase gifts for some people who have helped during this year. \$1 - \$200

Depending on your priorities, you can spend \$500 - \$2000 on outside activities.

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. You do not need to go overboard but don't be cheap as well.

8. Communication

As State President, it is important to have good communication with your Vice Presidents, state committee chairs, District Deputies, and local lodges.

Procedure

Update your Excel Distribution list of the names, email addresses and phone numbers of all Lodge Secretaries and Exalted Rulers throughout Idaho. You should have done this prior to the convention while working with the Directory Chair. If not, do so immediately.

Once you have returned to your residence, send an email to all Lodge Secretaries. Have the Lodge Secretary put your name on their monthly lodge bulletin list and invitation list to major events held at their local lodge. You will need this information to schedule visitations and to understand what is happening throughout Idaho

At least once between conventions, you should provide a brief ½ page comment to the lodges in your district.

9. Visitations

This year, you should try to visit all lodges Idaho at least once and preferably more. Depending on your budget, you should also visit as many lodges as you can throughout the state. If budgets are constrained, you can meet with two or three lodges at one event. Like previous years, 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, you need to meet with the lodge members and discuss various issues, identify potential problems, and gather information about how the lodges are doing.

Procedure

- A. Make sure you and your State Secretary **arrange your work schedules before you make your visitations.**
- B. Set up a 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.
- C. Notify the Board of Directors of your travel schedule.
- D. At a minimum you need to:
 1. Discuss the status of the state project with the membership.
 2. Promote the submission of grants to the state and ENF.
 3. Promote ENF donations, ENF and Grand Lodge Programs.
 4. Always discuss membership recruitment and publicity.

10. Official Visits to other States

You need to get to know your counterparts (OR, WA, AK, MT) who will be President the year you are. If you have not done so already, make an effort to meet them at the national convention. As part of this process, you may wish to make official visits to other states. **When doing so, get an invitation from the other state president at least two months prior to the date of the convention. Further, inform the State Sponsor which state(s) you plan to visit.** Of these, the spring convention in Oregon, and summer conventions Washington and Montana are the most important. Also, because Oregon is our

sister state and there may be budget constraints, the Oregon spring convention takes precedence if you need to choose one over others.

A list of all conventions and general dates are provided below. Some also require invitations. Contact a Past State President to assist in this process if necessary. **Take 200 State President's Pins with you to each convention.**

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

11. District Deputy Clinic Attendance

This year you should attend both District Deputy Clinics in your district. Remember, this is their time, be there in a supportive fashion and only assist if asked by the District Deputy. Your Vice President will also be there to discuss the state project.

Procedure

Contact the District Deputy two weeks following the convention and identify the time and location of the DD clinics to be held in the state.

12. Relationships with Vice-Presidents.

Relationships with your Vice Presidents are critical to the promotion of your programs within Idaho. You should be having regular meetings (quarterly or more frequent if needed). During these meeting, at a minimum, have an agenda to cover:

Committee assignments and progress within each.

Budgeting issues.

Visitations.

Membership Issues.

ENF donations.

Other State Issues.

In general, all officers should be discussing issues and developing a long-term plan to address these issues.

13. Working with the State Secretary

The State Secretary is one of the most important positions in the state. In addition to taking notes at the business meeting, they are responsible for numerous reports to Grand Lodge, Local Lodges, District Deputies, and committee chairs.

This person is responsible for ensuring all records of business meetings are correct and that past motions are easily available. Finally, they are responsible for updating the ISEA website.

14. Working with Committees

As first VP, you worked to develop committee assignments. Now you need to follow up with those committees. Further, you need to ensure the committees are functioning as desired by your leadership team. If a Vice President is not doing their job and keeping contact with their committees, you need to discuss that issue with them. Like you, they have a job to do.

In addition to being in charge of all committees, you also have direct responsibility for some yourself. They include:

- Accident Prevention / Risk Management (Along with the First Vice President).

- Convention Sites.

- Directory.

- ENF (Along with the First Vice President).

- Laws.

- Membership and Lapsation.

- National Convention Housing.

- Nomination's

- Parliamentarian.

- PR and Marketing.

- Training.

These committees are probably 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.

You will co-chair two of these committees with the First Vice President. Discuss the approach you want to take and decide what initiatives to pursue as a team.

Presidential Appointments that Need Additional Approvals

In addition to the committee chairs you identified, some need additional approvals. These include the following:

1. **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, Board of Director's Chair, State Sponsor, 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, CFOs/CPAs, 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: Not friends or people who just want to be on the board. Remember, these people are helping you oversee a multi-million-dollar projects. They need to be good.

Vetting Process

- a. After potential candidates are identified, request professional resumes, curriculum vitae, etc. These should be reviewed by the State Project Board Chair and others who are advising you about the candidates.
 - b. Upon review, the candidate will be proposed to the State Board of Director's at 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.
2. **CLMS Coordinators:** These are GL appointments. If a change is needed work with State Sponsor.

3. **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.
4. **Advisory:** The advisory committee will train all lodge officers, state officers, and trustees.
5. **Convention Sites:** First and Second VPs plus three Past State Presidents are members of this committee.
6. **Drug Awareness Chair.** If change needed, send the resume or vitae of the new chair to State Sponsor for their approval. Identify individuals with substance abuse prevention experience or solid knowledge of about substance abuse education who also can present well in public.
7. **Financial Review.** Identify a financial review chair and others with finance business, or accounting experience.
8. **National Convention.** Committee Chair, New President, 1st VP and 2nd VP are members of this committee.
9. **National Veterans Service Chair.** If a change needed, send the resume of a new chair to the State Sponsor for their approval.
10. **Hoop Shoot Chair.** If a change needed, consult with Regional Hoop Shoot Director.

15. Hoop Shoot

This year, you **should** attend the district hoop shoot and **must** attend the state hoop shoot. You **must** also attend the Regional Hoop Shoot (usually held in Oregon the first weekend in March). When doing so, bring a \$100 bill with you. The four State Presidents (AK,WA,OR,ID) put up \$100 each and at the end of the Hoop Shoot, the four Presidents have a shoot off. The winner gets the \$400 donated to ENF in his/her name and bragging rights. Do some practicing before the event.

On Saturday after the Hoop Shoot night there is usually a WA/OR PER Association dinner at a Lodge in Portland/Vancouver area. It costs approximately \$10 to join this group.

16. Newspaper Articles (If applicable)

Last year, you submitted articles to various media groups. This year your articles will be the front page. Make sure to say something of importance. Do not focus on visitations. Instead focus on accomplishments of the association, things to address, etc. Put a lot of time into these documents. They should be the best you have ever written.

17. State Presidents Pins

Hand out pins at your conventions other conventions you attend, Grand Lodge convention and other events.

18. Summer Convention and Winter Training Session

Summer Convention

This year, as State President, you need to have a significantly better report than last year. Have agenda items and specifics ready to discuss in meetings with the officers, advisory committee, and the general business session. You should be using PowerPoint if necessary during the business session to highlight information to the membership, plus outlined bullet points and handouts during these sessions to help you when meeting with the Board of Directors and Advisory committee.

You will also need to conduct the business meetings. Make sure you have reviewed your script, filled in and updated the appropriate materials, adapt if necessary and generally be ready to go. Use large font (Size 20 or more) to ensure you can read the script. Remember, how the convention is perceived reflects directly on you and the association. Do not mess this up. Pay attention to detail and know what is going on during the entire event.

You may also need to coordinate with the local lodge ER and Convention Coordinator to welcome local dignitaries (Mayor, Police Chief, etc.).

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

This year, you will be controlling the elections. The State Secretary will have materials for the Vice Presidents. You will need to identify three individuals to count ballots (preferably out of state current or past state presidents). Identify and ask these individuals on Thursday before the Opening of the Friday business session to do the ballot counting prior to the election on Friday. **Ballot totals from elections are confidential and should not be discussed with anyone!!!!!!**

On Friday morning, make sure all protocols are correct for the balloting.

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 is important. You will need to provide a review of your budget to the Board of Directors plus attend the Convention Sites, State Project and other committees. You also be attending a training committee yourself with the advisory committee. These materials are discussed in greater detail later in this document.

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

In addition, provide feedback about how lodges in your district are doing to the state president and trustees. Provide specifics and suggestions for assistance.

19. VIP Invitations to Events.

- a. When having the Summer Convention and the Winter Training Session, be sure to invite your fellow Presidents from surrounding states to attend to your Installation convention. Work with the Host Lodge on housing arrangements for your VIPS.
 1. Registrations (not food or activities) for out of state VIPS are complimentary.
 2. Housing, meals, golf, etc. are complimentary for the State Sponsor and visiting PGER
 3. Housing may be complimentary for the SDGER if lodge can get a 3rd comp room. This is coordinated through the host lodge. VIPS usually include:
 - a. State Sponsor.
 - b. PGER guest (Sponsor invites).
 - c. Grand Trustee.
 - d. SDGER of Idaho (if applicable).
 - e. President of OR.
 - f. President of WA.
 - g. President of MT.
 - h. President of AK.

- i. GL Committee people from OR (check with State Sponsor).
- j. GL Committee people from Area 8 (check with State Sponsor if they are doing presentations?)
- k. Family.
- l. Personal Elks friends from other states (let State Sponsor know if they are an Elks VIP).

20. Visiting PGER (or GER).

There is a specific protocol when picking up or working with a GER or PGER. **Make sure you work with State Sponsor on this.** They may want to meet and pick up the individuals instead.

Review the Protocol Manual to ensure you are familiar with the requirements for working with these dignitaries. Do not embarrass yourself.

Procedure

- a. You and your spouse (as President) should make every effort to meet the PGER at the hotel once they arrive.
- b. Ensure there is a welcome basket in the PGER room. Have **Two** copies of Convention booklets available. Also, include a bottle of favorite adult beverages for the PGER (and Spouse), snacks, and flowers.
- c. Have other State VIPS (VPs) if possible present to greet PGER upon their arrival.

Grand Lodge Issues to Address

- a. **Information for the Grand Secretary**
 - 1. If you have not done so, immediately following your installation, you will need to fill out a form with GL committee chairs. Get this form from the State Secretary.
 - 2. Fill out form name/addresses of State Officers, select State Committee Chairs. You will need each member's name, lodge #, member#, mailing address and UPS address.

b. Grand Lodge Convention

1. About 1-2 months before the GL Convention, you will get a form from current State Secretary (or contact Area 8 Fraternal Committee member) for carrying the State Flag in the Opening GL Ceremony.
2. Carry the State Flag at the Opening Ceremony (register w/ GL Fraternal Committee booth Saturday).
3. **At the Opening Ceremony, be sure 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.**
4. Attend the Monday meeting with the GER-Elect (ERs are also in this meeting).
5. Get your picture taken with GER-Elect.
6. Run the breakfast meeting with OR on alternate days (See your convention manual and talk with the National Housing Chair about this event).
7. Make sure 1 or 2 people are sent to Convention Center to reserve setting and setup Idaho Signs.
8. Attend each Grand Lodge session.

- c. 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, Grand Trustee Spouse, SDGER Spouse, select out of state VIP spouses. Additional information for this event is found in the Spouses Handbook.

d. Grand Lodge Breakfasts (May be optional)

You need to coordinate with the National Convention Housing Chair and Oregon State President and State Secretary to be on task. You will have script to follow for the GL breakfast. It is located in your summer convention manual. The general schedule is as follows:

- 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, Oregon 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 VP and/or ID PSP.

- 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 thru buffet line (head table 1st).
- j. When head table is done eating, make announcements of daily activities including the group picture, legislation, daily state events
- k. Adjourn the breakfast.

Ending your Year in Office

a. Submission of the Annual Report to Grand Lodge (April/May)

1. In April, you will need to submit the Annual Charity Report to Grand Lodge.
2. Make sure the First Vice President receives the form to carry the Idaho State flag at the Grand Lodge convention.

b. Summer Convention.

Review the documents provided above, follow the script provided for you.

After the new State President is installed, make sure you have gifts for the following:

Your spouse or significant other.

Your State Secretary and their Spouse.

Make Certificates of Appreciation for all State Committee Chairs for presentation at Summer Convention.

Make letters thanking the State Project Rehabilitation Board members who are not continuing into new year.

c. Winter Convention Following Your Term in Office

Present a final budget/expense report at Board of Director's meeting.

Other Information

State Uniform

As a reminder, 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.

Significant Others: 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 and are included in the Attachments section. Additional information for these activities is found in the State President Spouse’s Handbook.

Make sure you have gifts for your spouse or significant other. Do not skimp here. They put up with your work the past year. Let them know you appreciate their support. Finally, it is strongly suggested you take your significant other (and maybe other family members) on some sort of trip at the end of your year. Have some significant bonding and reconnecting time with each other. You both deserve it.

Get Well and Condolence Cards

Throughout the year, you will hear of members or their family becoming ill, experiencing trauma, or passing on. During these times “Get Well” or “Condolence” cards should be sent to let them know that you and the organization cares about their wellbeing and that you are thinking of them.

Thank You Cards

Whenever you attend a lodge, participate in an activity or event, receive a gift, always send a thank you card to the host immediately returning to your residence.

Final Closing Remarks

This year is your last year of a four-year process. How well you are perceived as State President will be evident by how hard you worked during the first three years and additional work during your Presidential year. If you worked hard and followed the guidance we have provided for you, this year will be fun, rewarding, and remembered by the membership for many years to come. As I said last year, there are no do-overs.

Remember, you now represent the membership of Idaho State. Make the membership proud of how you act, how you look, your accomplishments, and be ready to take the organization to the next level.

At your Summer convention, make sure you put in the effort to really thank the people who helped you make your year a success. Provide them with gifts, a beverage, etc. Let them know you could not have done this without their help.

We know your year will go well and wish you the best.

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

For Reading After the New President is Installed

Finally, your President's year is done. Now, you can sit back and relax a bit if you are allowed. You put in a lot of work over the past four years and need to take a break. You also now take on a new role. That is, being a Past State President (PSP) and becoming part of the State Advisory Committee.

This time may be very traumatic to you. You have had power and respect from the membership for the past four years. Now, in a second, after the new President's installation, it is gone. Further, the new State President may do things differently than you, have different priorities, etc. These things often result in some depression, resentment, and even anger. You may become short tempered, a bit anxious and even tense.

Recognize the emotions you are feeling is normal and part of a process that Psychologists call a "Resistance to Change." You just put your heart and soul into something for the last four years and now it is over. So, take some time and work through it. Talk to other PSPs, share your feelings with them. They have gone through it before you and can listen and help you through the process.

When asked, offer advice and mentorship to the new State President but DO NOT criticize, denigrate, butt-in or question the new President's management style. You were there once too and had to find your way. Allow them to experience those opportunities you had. However, do offer encouragement, help them relax a bit when necessary, give feedback if asked, listen to other advisory committee members, and relax a bit. You did your job and did it well.

Remember, you are only one of a few people who have ever held the State President's position. It is something to be proud of and something you will remember the rest of your life.

May your life be one of fulfillment to your family, yourself, and to "The Order."

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

Curt Neely, Past State President, Idaho State Elks Association, 1995 - 1996

Keith Mills, Past State President, Idaho State Elks Association, 2006 – 2007

Ed Sanman III, Past State President, Idaho State Elks Association, 2013 - 2014

Calendar Page / Things to Do

- April**
- a. Committees should be assigned and materials sent to the Directory Chair.
 - b. Solicit resumes/vitae for to replace individuals on the State Project Board or other committees needing approvals.
 - c. Begin discussing your work schedule with your employer.
 - d. Contact the National Housing Chair. Make sure everything is okay regarding your GL travel to the National Convention.
 - e. Make plane reservations if you have not done so.
- May**
- a. Contact the State Secretary. Get and fill out the required committee forms for Grand Lodge. Submit to the GL secretary.
 - b. Begin watching for a form from the GL Fraternal Committee to wave the flags at the opening ceremony.
 - c. Review your script for the Summer Convention.
 - d. Make an acceptance speech. Include thanks to others and family, lay out what you want to accomplish, etc.
 - e. Get gifts for the outgoing President, Secretary, their spouses, etc.
- June** **After the convention**
- a. Update your Excel Spreadsheet.
 - b. Contact all ERs and Lodge secretaries. Provide contact information, get on their mailing lists, get their bulletins, etc.
 - c. Get your picture taken, framed, and sent to all local lodges.
 - d. Create a President work schedule.
 - e. Send a reminder letter to ERs and secretaries regarding all grants.
 - f. Attend the Washington Convention if desired.
 - g. Look at the GL reports. **Do so, monthly until you are done.**

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 Vice Presidents and provide them with your schedule.
- d. Attend the Montana Convention if desired.
- e. Send an email to ERs and Lodge Secretaries regarding the grant deadline dates for ENF grants.

August

- a. Send an email to ERs and Lodge Secretaries regarding the grant deadline dates for Rehab grants.
- b. Attend the District Deputy Clinic.
- c. Arrange for a conference call to your state Vice Presidents.
- 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. Attend the State Project board meetings.
- c. Send a letter to the State Newspaper Chair.
- d. Contact your committee chairs to see how they are doing.
- e. Send VIP letters to people you want to invite to the Winter Training Session.
- f. Talk to the Winter Training Session coordinator about the session

October

- a. Send an email reminder regarding the Winter Training Session to all lodges.
- b. Contact the Trustee representative and discuss your budget.
- c. Prepare for the Winter Training Session.
- d. Review scripts, etc.

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. Meet with your VPs, attend the Board of Director's meeting, etc.

December

- a. While Vice President you got to take a break. Sorry, not this year.
- b. Make reservations at the convention hotel for the Idaho State Summer convention.
- c. Send a Christmas letter to all the lodges.

January

- a. Attend the District Hoop Shoot.
- b. Contact the DD regarding their next meeting.
- c. Continue contacting committee chairs.
- d. Begin conversing with the VP and Host Lodge Convention chair where the Summer Convention will be held.
- 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 State Hoop Shoot.
- b. Send a congratulations letter to the new ERs. Identify when their installation will be done and when. Attend some if you can.
- c. All committee chairs should be identified. Send this information to the Directory Chair.
- d. Review your Presidential Budget with the Trustee representative.
- e. Send VIP letters to other states about the summer convention. Include a registration form.

March

- a. Attend the Regional Hoop Shoot in Portland.
- b. Send in your media articles.
- c. Attend lodge officer installation ceremonies if desired.
- d. Start reviewing convention scripts, etc.
- e. Start working your convention speech.
- d. Start thinking of gifts you want to purchase for people.
- f. Conduct a conference call to your VPS.
- g. Send a letter to all local lodges.

April

- a. Attend the Oregon convention if possible.
- b. Contact your committee chairs.
- c. Attend the District Deputy Clinic.
- d. Get the membership numbers from the GL website. Give to the First Vice President.
- e. Finalize State Convention Plans with the Host Lodge Chair.
- f. Continue working on your speech.

May

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

June

- a. Attend State Convention.
- b. Have gifts, letters of appreciation for the committee chairs, etc.
- c. Have gifts for spouses.

Appendix A

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

Appendix B

Responsibilities of ISEA President's Spouse

These documents are provided for general review so you understand the responsibilities of your spouse. This information with forms is provided in the State President Spouse's Handbook

Generally, the ER's and State President's spouses are responsible for spouse's social events at the Grand Lodge Convention, Summer Convention, and Winter Training Session. These events are designed to be fun while allowing attendees to meet with other spouses.

Grand Lodge Convention: Held in July

This event is more of a "Meet and Greet" for ER spouses and others attending the Grand Lodge Convention. It is designed to be relaxing and less formal than the Summer Luncheon.

Tasks

June, One Week Following the ISEA Summer Convention (or before)

- a. Contact the National Convention Housing Chair. They will have identified a time and room for the event. This event will be held in the Idaho hotel.
- b. Get a list of spouses and email addresses from the National Convention Housing Chair.
- c. Send an invitation letter to all ER's spouses, State Sponsor Spouse, the Grand Lodge Spouse, Out of State Spouses, and others inviting them to attend a "Meet and Greet" (Continental Breakfast).
 1. Include the date, time, and location of the event. See the Spouses Handbook for proper protocol and examples of invitations.
- d. If possible it is nice to have some little memento for each attendee.
- e. **Dress is Summer Business Casual: Dress, Skirt, Nice Slacks / Capris and Nice Top (No Jeans, Shorts, or Tank Tops)**

- f. The President's Spouse will organize some kind of activity that will get everyone acquainted (e.g., They can have everyone introduce themselves and add something that no one would know about them). During the introductions, the President's Spouse will have the other spouses focus on **WHAT THEY DO, NOT WHAT THEIR SPOUSE DOES OR THEIR SPOUSE'S POSITION**. If time allows, it is fun to do some kind of fun activity or game.

Spouse's Luncheon at the Winter Training Session

Overview

The Spouse's Luncheon at the Winter Training Session is usually on Friday. It is less formal in nature and but can include dignitary spouses, spouses from other states, and new spouses of Leading Knights or others.

The ER's Spouse organizes this event. The ER's Spouse will need to determine the seating arrangements (rounds, squares, rectangles head table, etc.).

The State President's Spouse is the Master of Ceremonies for the luncheon.

Dress is Winter Business Casual: Dress, Skirt, Nice Slacks, and Nice Top (No Jeans).

Procedure

Three Months before the Event

- a. The ER's spouse will contact the Convention Chair and identify the type(s) of events they wish to hold. During these discussions, the spouse will select the room size, food and beverages, and type of entertainment.
- b. Use the Protocol Information Sheets located in the Appendix for seating positions at this event.
- c. The ER's Spouse will send out personal written invitations to the spouses inviting them to participate. Information will include:
 1. The location and time the activity(s) will take place.
 2. The recommended dress code.
 3. RSVP.
- d. The ER's Spouse will contact the President's Spouse and inform them of the arrangements.

- e. The President's Spouse will organize some kind of activity that will get everyone acquainted (e.g., They can have everyone introduce themselves and add something that no one would know about them). During the introductions, the President's Spouse will have the other spouses focus on **WHAT THEY DO, NOT WHAT THEIR SPOUSE DOES OR THEIR SPOUSE'S POSITION**. To assist in this process, have them identify their interests, their hobbies, activities they participate in, etc.

Master of Ceremonies Protocol

The State President's Spouse is the Master of Ceremonies for the Ladies Luncheon. It is the responsibility of the President's Spouse to make proper introductions of the State officer's spouses / significant others, Out of State dignitaries, VP's spouses / significant others, and others as appropriate. The Special Deputy's spouse (if in attendance) will introduce the Grand Lodge Spouse(s).

Order of Business for the Spouses Luncheon

- a. **Prayer**
- b. **Pledge**
- c. **Introductions**
 - 1. Introductions of individuals are made in the following order:
 - a. State Officer Spouses.
 - b. Out of State dignitary's spouses.
 - c. VP Spouses.
 - c. Others as appropriate.
 - d. Special Deputy's Spouse (if in attendance).
- d. **Lunch is then served.**
- e. **An activity or entertainment might be introduced.**
- f. **End of Luncheon**
- g. **Thank everyone for attending**, make announcements if necessary and close the Luncheon.

Summer Convention

Overview

The Spouse's Luncheon at the Summer Convention is usually on Friday. It is more formal in nature and often includes dignitary spouses, spouses from other states, as well as new spouses. In addition to lunch, there are awards given for the Idaho Elk's Lady of the Year, and gifts for State Officer's spouses.

The "Meet and Greet" is an optional event that is designed as an informal get-together usually held on Thursday. This may include a continental breakfast, coffee and treats, or some other activity.

ER's Spouse

The ER's Spouse organizes these events. This person will need to determine the seating arrangements (rounds, squares, rectangles, if a head table is required, etc.). For this event and dignitaries attending, a Head Table is optional but strongly recommended.

State President's Spouse

- a. You, as the President's Spouse are the Master of Ceremonies for the luncheons. You will also organize the Idaho Elk's Lady of the Year nomination, ceremony, and present the award.
- b. The State President's Spouse is also responsible for purchasing and presenting gifts to the Vice-President's Spouses.
- c. The new incoming President's Spouse is responsible for purchasing and presenting a gift to the Outgoing President's Spouse.
Dress is Summer Business Casual: Dress, Skirt, Nice Slacks / Capris and Nice Top (No Jeans, Shorts, or Tank Tops)

Procedure

Three Months before the Event

- a. The ER's spouse will contact the Convention Chair and identify the type(s) of events they wish to hold. During these discussions, the spouse will identify the room size, if a head table is needed, food and beverages they wish available, type of entertainment, etc.
- b. Use the Protocol Information sheets located in the Appendix for seating positions at this event.
- c. The ER's Spouse will send out personal written invitations to the spouses inviting them to participate. Information will include:
 1. The location and time the activity(s) will take place.
 2. The recommended dress code.
 3. RSVP.
- d. The ER's Spouse will contact the President's Spouse and inform them of the arrangements.
- e. The President's Spouse will organize some kind of activity that will get everyone acquainted (e.g., They can have everyone introduce themselves and add something that no one would know about them). During the introductions, the President's Spouse will have the spouses focus on **WHAT THEY DO, NOT WHAT THEIR SPOUSE DOES OR THEIR SPOUSE'S POSITION**. To assist in this process, have them identify their interests, their hobbies, activities they participate in, etc.

Master of Ceremonies Protocol

The State President's Spouse is the Master of Ceremonies for the Ladies Luncheon. It is the responsibility of the President's Spouse to make proper introductions of the State officer's spouses / significant others, Out of State dignitaries, VP's spouses / significant others, and others as appropriate. The Special Deputy spouse (if in attendance) will introduce the Grand Lodge Spouse(s).

Order of Business for the Spouses Luncheon

- a. **Prayer**
- b. **Pledge**
- c. **Introductions**
 - 1. Introductions of individuals are made in the following order:
 - a. State Officer Spouses.
 - b. Out of State dignitaries' spouses.
 - c. VP Spouses.
 - c. Others as appropriate.
 - d. Special Deputy's Spouse (if in attendance).
- d. **Lunch is then served.**
- e. **Entertainment (if desirable).**
- f. **Presentation of Gifts**
 - 1. When lunch is over "Thank you" gifts are given in this order:
 - a. The State President provides gifts to the Vice President's spouse.
 - b. The Incoming State President's Spouse gives the "Outgoing" State President's Spouse a gift.
- g. **Idaho Elk's Lady of the Year**
 - 1. After gifts are given, the "Idaho Elk's Lady of the Year" is announced and presented with her plaque.
- h. **End of Luncheon**
 - 1. Idaho Elk's Lady of the Year award picture is taken.
- i. **Thank everyone for attending**, make announcements if necessary and close the Luncheon.

Summer Convention “Meet and Greet” (Optional Event)

Overview

If held, the “Meet and Greet” is an event held on Thursday. Generally, this event may revolve around a continental breakfast, brunch, breakfast with coffee, donuts, or other activity. This event is held for spouses to get acquainted with other spouses and normally held at the host lodge.

Dress is Summer Casual: Skirt, Nice Slacks, Capris, and Nice Top (No Jeans, Shorts or Tank Tops)

Procedure

Three Months before the Event

- a. The ER’s spouse will contact the Convention Chair and identify the type(s) of event they wish to hold. During these discussions, the spouse will identify the room size, food, and beverages they wish available, etc.
- b. The ER’s Spouse will send out personal written invitations to the spouses inviting them to participate. Information will include:
 1. The location and time the activity(s) will take place.
 2. The recommended dress code.
 3. RSVP.
- c. The ER’s Spouse will contact the President’s Spouse and inform them of the arrangements.
- d. The President’s Spouse will organize some kind of activity that will get everyone acquainted (e.g., They can have everyone introduce themselves and add something that no one would know about them). During the introductions, the President’s Spouse will have the other spouses focus on **WHAT THEY DO, NOT WHAT THEIR SPOUSE DOES OR THEIR SPOUSE’S POSITION**. To assist in this process, have them identify their interests, their hobbies, activities they participate in, etc. If time allows, it is fun to do some kind of activity or game.

Procedure for Idaho Elk's Lady of the Year.

February

Send out a letter to each Lodge ER, Lodge Secretary, and Lady Elks Organization Presidents (for those lodges that still have one). This letter is very important and gives each Lodge a chance to nominate that special lady that has stepped up and went "above and beyond" in serving her lodge, community, etc. **The nominations must be submitted by April 25th and received by the First Lady no later than May 1st.** Names of Exalted Rulers, Lodge Secretaries, etc. can be obtained from the First Vice President or State Directory Chair.

- a. A sample letter, guidelines, and nomination form are provided on the next three pages. State letterhead is encouraged. A blank copy is included in the Appendix.

May 1.

- a. Once the applications are received, the President's Spouse will select a committee of 2-3 individuals to review applications and decide who is most worthy of the award.
- b. It is strongly suggested that members of this committee not be involved with the Elks to reduce any potential bias. **Decisions should be made by May 5.**
- c. Once a decision has been made, begin contacting family members, lodge members, the sponsor of the application, and potential friends to invite them to attend the Spouse's Luncheon and observe their friend receive the award.
- d. Purchase some type of plaque or memento to be given to the winner. This is a presentation done by the outgoing President's spouse.
- e. Take a picture of the winner. This picture will be placed in the "Past Elk Lady of the Year Album" along with the letter that was submitted by application's sponsor. This album should be passed down to the spouse of the incoming President.
- f. Send an article with a copy of the picture to the state newspaper and webmaster.

Additional materials and forms for the Idaho Elk's Lady of the Year are found in the President Spouse's Handbook