

**MARYLAND, DELAWARE AND
DISTRICT OF COLUMBIA
ELKS ASSOCIATION**



**OFFICERS / MEMBERS LEADERSHIP
TRAINING MANUAL**

Revised 05/18/2016

MARYLAND, DELAWARE & DISTRICT OF COLUMBIA ELKS ASSOCIATION

SUBORDINATE LODGE OFFICER/MEMBER TRAINING PROGRAM

LEADERSHIP

As an officer, trustee, or committee chairman of your lodge you are looked upon for leadership in making your lodge and club successful. Good leadership is made possible by accepting the responsibilities of getting necessary work done and by achieving harmonious relations with whom you are working. Little or nothing can be accomplished in solving problems or reaching goals unless people work together, avoiding the bickering that solves absolutely nothing. What people do or fail to do cause the majority of problems, and only people working together, undoubtedly not always in agreement, can problems be solved and goals reached.

A good leader must be consistent in their actions, be relatively free from bias, respect the use of authority, refrain from the use of anger and is understanding in all dealings with lodge members and associates.

It is definitely the type of people, not the system, which makes for good or poor lodge management. The best system in the world can fail if mismanaged, while an imperfect system could be successful with competent leadership.

PRELIMINARY PREPARATIONS:

Your preparations for assuming the office should include:

- A. Study the Laws of the Order
- B. The By-Laws of your lodge
- C. Manuals available - Grande Lodge
- D. Roberts Rules of Order

It is expected that you will become thoroughly familiar with all of them but you should have sufficient knowledge to permit you to refer to them when necessary.

THE 3 "C'S" OF A LODGE OFFICER

COMMITMENT:

- * All officers must be firmly committed to fulfilling their obligation as an officer, including the commitment of the time required to function effectively.
- * All officers should attend every Lodge Meeting. Absence will occur, but they should be infrequent.
- * Commitment also includes memorizing or impressively reading your Ritual.

COOPERATION:

- * The officers must cooperate
 - with each other
 - with committees
 - with the members
- * Cooperation is a "give-and-take" function; you can't always have your own way.

COMMUNICATION:

- * Communicate with each other and with members of the lodge.
- * Meet together at least monthly to review programs and plans.
- * Be open in your communications. Give others the benefit of your thoughts and ideas; your likes and dislikes.
- * Communication solves problems--or keeps problems from arising.
- * Listening is a communication skill also. Sometimes you can learn more by listening than talking.

YOU ARE ALL IMPORTANT - PART OF THE TEAM

Teamwork is vital

No one officer can run the lodge

Every officer is equally important

HOW TO DEVELOP LEADERSHIP SKILLS

WHAT IS LEADERSHIP? It's inspiring and helping people do work toward a goal.

Leadership doesn't necessarily mean "taking charge" -- there are many different ways to lead. For example:

- Setting an example for others to follow, in what you say and do.
- Introducing new ideas that help solve problems--in other words, "thinking up and speaking up"
- Helping to settle differences and disagreements by encouraging a spirit of cooperation.

WHY SHOULD I LEARN ABOUT DEVELOPING LEADERSHIP SKILLS?

Because - even though everyone isn't a born leader--everyone can develop leadership skills, and everyone can benefit from using them. Whether you're appointed, elected or simply assuming an informal leadership role, leadership skills can help you:

- CONTRIBUTE to the achievement of group goals, by helping focus everyone's energy on the task at hand.
- GROW professionally, since leadership skills can be applied in any line of work.
- ENJOY personal growth and satisfaction, from knowing that you're making a difference in the world around you.

EFFECTIVE LEADERS ARE GOOD COMMUNICATORS--Whenever you're working with people, success depends on your ability to communicate. Communication is the art of getting a message across.

Forms of communication may be:

WRITTEN - information is sent via letters, memos, reports, etc.

SPOKEN - the message is transmitted by the speaker via phone calls, speeches and conversation.

UNWRITTEN AND UNSPOKEN - people form attitudes and opinions based upon the communicator's tone of voice, body language, mannerisms, etc.

HOW CAN I DEVELOP OTHER IMPORTANT LEADERSHIP SKILLS? YOU CAN START BY BECOMING "TEAM MINDED."

HELP DEVELOP TEAM SPIRIT - As a leader you can encourage enthusiasm and sense of belonging among lodge members and committees by showing:

FRIENDLINESS - Others will be more willing to share ideas if you're interested in them and people too.

UNDERSTANDING - Everyone makes mistakes. Try to be constructive, tolerant and tactful when offering criticism.

FAIRNESS - Equal treatment and equal opportunity lead to an equally good effort from group members.

GOOD WILL - Group members will take their tasks more seriously if you show that you're more interested in group goals than your own personal gain. Remember, volunteers should be treated accordingly.

KEEP EVERYONE WORKING TOWARD TEAM GOALS - A team of individuals working together, sharing ideas and responsibilities can accomplish much more than a team of individuals working alone.

Remind everyone of the group's purpose from time to time - It's easy to become side-tracked and lose sight of your goals. Write it down and resend as a reminder periodically to recalibrate the leadership focus.

Provide encouragement and motivation, by showing your appreciation for good ideas and extra attention.

Harmonize differences and disagreements between group members by stressing compromise and cooperation. Don't hesitate to make decisions, however, when necessary.

Involve everyone in discussions and decisions, even if it means asking for opinions and ideas.

Delegate responsibilities - Everyone should share the work to be done, so that everyone can share pride in the group's accomplishments. Everyone should know what's expected of them, what resources are available, what deadlines to meet, etc.

SOME TIPS ON BECOMING A GOOD COMMUNICATOR

PERSON-TO-PERSON COMMUNICATION

DEVELOP YOUR SPEAKING SKILLS - Speaking, whether to an individual or to a group is a skill that improves with practice.

BE "TIMELY" - Present on information that's current and relevant. Also make it a point to be on time and stick to the schedule.

PRACTICE GOOD LISTENING HABITS - Be courteous and pay attention to what's being said. Take notes, and ask questions if you're confused.

KEEP A POSITIVE ATTITUDE - Even if you disagree with what's being said, don't let your emotions interfere with clear thinking. Summarize without injecting your opinions, too.

WRITTEN COMMUNICATION

BE BRIEF - Stick to the subject at hand - avoid being confusing.

BE ACCURATE - Check all the facts before putting anything on paper.

KEEP IT SIMPLE - Don't use confusing terminology or unnecessarily complicated explanations.

*****COMMUNICATION IS THE KEY TO DEVELOPING AND USING ALL OTHER LEADERSHIP SKILLS - BECAUSE PEOPLE CAN'T WORK TOGETHER WITHOUT COMMUNICATING*****

KEYS TO LEADERSHIP

1. **BE A LEADER:**

Make people want to do things - results are achieved by leading, not driving. Force stimulates reluctance. Inspiration stimulates willingness.

2. **STUDY YOUR SUBORDINATES:**

Determine what makes each tick; their motives, their attitudes. Some need security - some need praise - some need criticism.

3. **BE A GOOD LISTENER:**

Know your people - encourage them to talk - ask questions - don't dominate a conversation. If both speak, let the other have the floor.

4. **CRITICIZE CONSTRUCTIVELY:**

Get all the facts - suggest constructive action - question the method, not the motive.

5. **CRITICIZE PRIVATELY:**

This vital rule is often broken. Reprimand in the presence of others causes shame, humiliation and resentment. It undermines authority.

6. **PRAISE PUBLICLY:**

People like it. It is good for their morale and self-confidence.

7. **SHOW CONSIDERATION:**

It builds a strong, hard-working, loyal team. Be courteous. Try to recognize people's problems, and appeal to their pride, personality, and self-respect.

8. **DELEGATE RESPONSIBILITY:**

Delegating responsibility is the essence of good administration. Denying responsibility invites discouragement and the possible loss of good workers.

9. **GIVE DUE CREDIT:**

Giving credit where it is due strengthens initiative - taking undue credit destroys initiative. YOU get the credit for building a good committee, but more importantly, the committee deserves credit for what it does.

10. **AVOID DOMINATION:**

This breeds yes-men. Capable committees want to work "with" not "for" their Exalted Ruler.

11. **SHOW INTEREST IN AND APPRECIATION FOR THE OTHER FELLOW:**

Be human - use first names - talk about hobbies and family - just chat; don't overload with work. This pays in loyalty and performance.

12. **SUGGEST - NOT DEMAND:**

This gets better results than giving orders.

13. **HAVE A REASON FOR A SUGGESTION:**

When you make a request or a suggestion, be sure to tell the reasons for it. People want to know WHY? People are disenchanted by cryptic or arbitrary requests.

14. **TALK ABOUT YOUR PLANS EARLY:**

Let your committee in on your plans and programs even when they are in an early stage. This give each committee a sense of participation, and they feel a personal responsibility for its success. Remember, an assistant's unsolicited idea stimulated by your early discussion may improve the project.

SUBORDINATE LODGE DIVISION OF DUTIES BY OFFICE

NO LODGE YEAR CAN TRULY BE SUCCESSFUL WITHOUT THE SOLID PERFORMANCE OF ALL COMMITTEES. WHILE THE EXALTED RULER HAS THE RESPONSIBILITY OF APPOINTING ALL COMMITTEES THE COMMITTEE FUNCTIONS ARE SO IMPORTANT AND HAVE GROWN SO LARGE IN NUMBERS IN LODGES, IT IS EVIDENT THAT THE EXALTED RULER CANNOT DO THIS EFFECTIVELY ALONE. THE GENERAL DUTIES OF THE CHAIR OFFICERS ARE TO A GREAT DEGREE DEPENDENT UPON THE EFFECTIVENESS OF COMMITTEES. SO, ONE CONCEPT FOR MANAGING OR MONITORING THE COMMITTEES AND PROGRAMS THAT HAS PROVEN EFFECTIVE IN MANY LODGES IS AS FOLLOWS:

DIVIDE THE LODGE COMMITTEES INTO FOUR GENERAL CATEGORIES AND ASSIGN EACH OF THE THREE KNIGHTS A CATEGORY WITH THE EXALTED RULER TAKING CHARGE OF THE FOURTH. THE KNIGHTS WOULD THEN BE CHARGED THE RESPONSIBILITY IN THEIR PARTICULAR CATEGORY OF:

1. AFTER INPUT FROM OTHER OFFICERS SUGGEST TO THE EXALTED RULER COMMITTEE CHAIRS.
2. GENERAL MONITORING OF EACH COMMITTEE IN THEIR CATEGORY WITHOUT ATTEMPTING TO RUN THE COMMITTEE, BUT MERELY TO GUIDE AND ASSIST THEM-
- ACT AS A LIAISON TO THE EXALTED RULER AND OTHER OFFICERS.

THE ESQUIRES WOULD BEGIN HIS TRAINING BY BECOMING FAMILIAR WITH THE FINANCIAL STRUCTURE OF THE LODGE. THEY SHOULD BE PERMITTED TO REVIEW WITH THE EXALTED RULER AND TRUSTEES THE PREPARATION AND MONITORING OF THE BUDGET, FINANCIAL REPORTS TO THE LODGE, P&L REPORTS, MONEY RAISING ACTIVITIES AND RELATED EXPENSES. THESE TYPES OF ACTIVITIES WILL BE A GOOD FOUNDATION FOR LEARNING THE OPERATION OF THE LODGE AND SOCIAL QUARTERS AND TO PREPARE THEM FOR A CHAIR OFFICE.

GENERAL COMMITTEES / CATEGORIES ALLOCATION

EXALTED RULER - ADMINISTRATIVE & LODGE

- AUDITING AND ACCOUNTING COMMITTEE
- INVESTIGATION COMMITTEE
- ACCIDENT PREVENTION COMMITTEE
- HOUSE COMMITTEE
- STANDING RELIEF COMMITTEE
- STRAY ELKS
- BUILDING
- FINANCE
- PER ASSOCIATION
- RITUALISTIC
- STATE MAJOR PROJECT

LEADING KNIGHT - CHARITABLE

- FRATERNAL COMMITTEE
 - o AMERICANISM
 - o ELKS NATIONAL FOUNDATION
 - o FLAG & MEMORIAL DAY
 - o MEMBERSHIP
 - o LODGE ACTIVITIES
- ELKS NATIONAL VETERANS SERVICE COMMITTEE
 - o ADOPT-A-VETERAN
 - o FREEDOM GRANTS
 - o WELCOME HOME
 - o VETERANS LEATHER PROGRAM
 - o PLAYING CARDS FOR VETERANS
 - o RE-CREATION
- SICKNESS AND DISTRESS
- SICK VISITATION
- CHRISTMAS & THANKSGIVING BASKETS
- SOCIAL & COMMUNITY WELFARE
- COMMUNITY CHARITY PROGRAMS
- TRUSTEES MEETINGS

LOYAL KNIGHT - COMMUNITY IMAGE & YOUTH PROGRAMS

- ACTIVITIES COMMITTEE
 - o COMMUNITY PROJECTS AND ACTIVITIES
 - o YOUTH ACTIVITIES
 - o HOOP SHOOT
 - o SOCCER SHOOT
 - o DRUG AWARENESS
- PUBLIC RELATIONS COMMITTEE
- YOUTH SCHOLARSHIPS
- INTER-LODGE VISITATIONS & PROGRAMS
- CITIZENS PROGRAMS

LECTURING KNIGHT - SOCIAL & LODGE PROGRAMS

- BULLETIN COMMITTEE
- ENTERTAINMENT COMMITTEE (Examples)
 - o BOWLING
 - o GOLF
 - o FISHING DERBY
 - o DANCES
 - o PICNICS
 - o NEW YEAR'S EVE
 - o SPECIAL LODGE EVENTS
- MOTHER'S DAY PROGRAM
- LAW ENFORCEMENT NIGHT
- GOVERNMENT RELATIONS
- ORIENTATION
- LAPSATION

ESQUIRE - BECOME FAMILIAR WITH FINANCIAL STRUCTURE OF LODGE

- REVIEW PREPARATION AND MONITORING OF BUDGET
P & L REPORTS
- OTHER LODGE & CLUB FINANCIAL REPORTS
- SECRETARY
- TREASURER

NOTE – Each Chair Officer should be prepared to offer insight into the committees and activities that they are charged to manage. When the Exalted Ruler requests committee and activity reports during the regular lodge business meeting, each respective Chair Officer should speak on behalf of the committee or activity if the committee chairperson is not present.

** Please review the Exalted Ruler, Lodge Officer, and Committee Members Manual for additional information on Grand Lodge committees and recommended activities.

PARLIAMENTARY PROCEDURE

TO CONDUCT A LODGE MEETING PROPERLY, YOU SHOULD KNOW:

CHAIR(Exalted Ruler)

- Rule Promptly, with authority
- Preserve Order
- Control debate
- State Motions
- Put the question (Call for the vote)
- Has tie-break vote

The CHAIR decides all questions of order without debate, but can be over-ruled.

ALL REMARKS TO AND THROUGH THE CHAIR

- **ALL** members rise and address the Exalted Ruler. When recognized by the Exalted Ruler the member will be at liberty to deliver his remarks.
- It is highly improper to carry on private conversation or to address another member except through the CHAIR.

NO QUESTION (VOTE) STATED WITHOUT A MOTION AND SECOND

TO WITHDRAW A MOTION REQUIRES CONSENT OF THE SECOND BEFORE QUESTION IS STATED.

NO DEBATE AFTER QUESTIONS IS PUT (Vote is called for)

NEEDLESS MOTIONS

- To accept minutes of previous meeting
- To accept Treasurer's report
- To close nominations (also, no second is required to a nomination)

2/3 MAJORITY REQUIRED TO RESCIND (any previous action)

2/3 MAJORITY REQUIRED TO OVER RULE THE CHAIR (decision on point of order)

RESOLUTIONS MUST BE PRESENTED IN WRITING

NO MEMBER TO SPEAK MORE THAN TWICE ON THE SAME SUBJECT WITHOUT PERMISSION OF EXALTED. (This is something to watch for on hotly debated issues)

Following simple Parliamentary Procedure makes for an orderly conduct of business and avoids the helter-skelter, haphazard approach which usually results in confusion and misunderstandings.

The abbreviated version of Robert's Rules of Order are available from the Grand Lodge Secretary's Office is easy to follow and understand.

You don't have to be an expert, but a little expertise in Parliamentary Procedure will make your lodge meeting go much smoother.

PROTOCOL

ALONG WITH PARLIAMENTARY PROCEDURE, YOU SHOULD HAVE AN UNDERSTANDING OF A FEW RULES OF PROTOCOL:

INTRODUCTIONS: (Always given in reverse of precedence)

- Subordinate Lodge
- State Association
- Grand Lodge

* Generally, it is the duty of the Esquire to introduce visitors to the Lodge; by name, present or past title, and Lodge affiliation; however the Exalted Ruler may request specific introductions by made by some other member.

SEATING: (Usually of concern for banquets and other social functions)

- Honored Guest to the Right of the Exalted Ruler
- Honored Guest's Entourage to "Their" Right
- Other Officials to the Left of the Exalted Ruler

* Whoever is the "person-of-the-hour" sits to the Exalted Ruler's right

* One way to avoid any breach of Protocol is to minimize seating at a head-table.

INVITATIONS:

- Grand Lodge Officials – sent via DDGER to PGER
 - All invitations to Grand Lodge Officials should go through the PGER, State Sponsor.
 - Lodges should never contact these officials directly
- State President - via District Vice-President; Your DVP should be the one to extend an invitation to the State President to attend a function in your Lodge.
- D.D.G.E.R. -- Direct Invitation by the Lodge.

PROPER DRESS: Neat - Uniform

- Yes, Protocol extends to proper dress
- All Officers should be similarly attired; i.e., all in business suits, all in Lodge or State Blazers, all in black Tux, or all in white jackets.
- Candidates for initiation should wear jackets; not casual dress.

A brief summary of the Protocol Manual will enlighten you further on this subject

**BENEVOLENT AND PROTECTIVE
ORDER OF ELKS**

LODGE CALENDAR - MONTHLY CHECKLIST

MARCH (*Incoming Exalted Ruler-Elect*)

- Select statutory Committees and Chairmen
- Before installation appoint an Esquire, Chaplin, Inner Guard, and Tiler
- Select other committees as required by Lodge By-Laws. Also appoint a Presiding Justice of the Subordinate Forum before or shortly after installation
- All Officers belong to National Foundation
- Prepare for Lodge Budget

APRIL

- Prepare new Exalted Ruler's report and send to District Deputy (DD) Grand Exalted Ruler
- Ensure Lodge Budget presentation no later than May
- Attend DD clinic- attendance required (*Exalted Ruler, Leading Knight, Secretary, and Chairman of the Trustees*)
- Meet with new local lodge leadership to prepare Annual lodge Calendar – plan the entire year using this monthly list
- Think through lodge programs and activities for the year
- Start preparing for Audit Report due June 30
- Prepare Annual Report due May 1
- Plan a program or dinner to honor local graduates
- Plan a youth activity for Youth Week - 1st week in May
- Meet with other Chair Officers - each officer should be responsible for major lodge programs - charity, community, youth programs, etc.
- Attend State Association Spring Meeting and annual State President election
- Prepare Mother's Day program, local radio or special program at lodge

MAY

- Present Youth Week program
- Present Budget to Lodge
- Present Mother's Day program
- Meet with committees to plan summer events
- Check Progress of Membership / Lapsation committee
- Make arrangements to attend State Association Convention and Grand Lodge Session (*Exalted Ruler required; encourage officers to attend*)
- Lodge dues to State Association due by June 1
- State Association Memorial Day Picnic at Camp Barrett
- Appoint Delegates and Alternate Delegates to State Association (*see association by-laws for number*)
- Annual Report to Grand Lodge
- Have each committee present an activities report at a regular lodge meeting
- Check progress of committees, are chairmen active and working with their committees. Meet with those that are not active
- Attend Trustee and House Committee Meetings.
- Plan Flag Day Program. (*invite community and other organizations to attend*)
- Prepare special event for Father's Day - special buffet or father & children dinner

JUNE

- Attend State Association convention, encourage other officers and committee chairmen and committee members to attend
- Special graduation program or dinner
- Present Flag Day Program
- Father's Day Event
- Review your committees - are they performing their duties
- Audit Report due to Grand Lodge Auditing no later than June 30
- Plan a 4th of July social

JULY

- Attend Grand Lodge Session (*Exalted Ruler required*)
- Meet with Officers and Committees, review their progress and plan future activities
- Review performance of Committee Chairpersons, replace those that are not performing well – Lodge Officers charged with oversight of committees should offer recommendations
- Review membership / lapsation - special summer activity for those that have not paid their dues
- July 4th celebration

AUGUST

- Meet with Officers and Committee Chairpersons, share new GER information and Grand Lodge programs with Officers and Lodge.
- Attend DD clinic. (*Exalted Ruler, Leading Knight, Secretary, and Chairman of Trustees*)

SEPTEMBER

- Report to Lodge on Grand Lodge Session and programs presented at DD clinic (*mandatory*)
- Meet with Officers and Committees to review progress of new Grand Lodge programs planning
- Start Preparations for the District Deputies official and unofficial visits; review checklist for the DD visit
- Review progress of House Committee, meet with Trustees for bi-annual budget review – make changes where necessary
- Review membership / lapsation
- Make arrangements to attend State Association Fall Meeting (*Encourage officers to attend*)
- Appoint Lodge Member to Elks Camp Barrett Board of Governors
- Make preparations through State Vice President for his visit or the State President if visiting your lodge this year
- Plan any Thanksgiving Day social or community event at the Lodge

OCTOBER

- Meet with Chair Officers and Committee Chairpersons to review their progress
- Membership / lapsation review
- Attend State Association Fall Workshop. Election of Camp Barrett Chairman, Board of Governors *(Encourage officers to attend)*
- State preparation for November Veterans Remembrance program

NOVEMBER

- Veterans Program - adopt a veteran, hospital visits
- Thanksgiving event
- Start preparation for Christmas Charity Program and Lodge Christmas programs
- Make preparations for Memorial Day Program
- Joint meeting with all Officers, Committee Chairpersons and Committee members to review their progress; determine what changes must be made in Lodge and Club programs

DECEMBER

- Elks Memorial Day Service
- Christmas celebrations for members, ladies, and children. Plan New Year's celebration
- Review membership / lapsation; invite delinquent members to pay dues and attend Christmas programs

JANUARY

- Attend State Association Winter Conference *(Encourage officers to attend)*
- Meet with Officers - review progress
- Start plans for election of Officers
- Encourage Officers to continue and consider new members to become an Officer or work on a committee
- Read delinquency list to lodge and solicit help in getting members to pay dues
- Ask PER Association for help with lapsation

FEBRUARY

- Past Exalted Ruler's night
- Hold special initiation in honor of PERs
- Nomination and election of Officers and alternate representatives to Grand Lodge
- Provide directory information to State Association
- Plan installation of Officers with Exalted Ruler-Elect,
- Meet with ER-Elect; review with him the performance of Officers, Committee Chairpersons and Committee Members

MARCH

- Meet with current and incoming officers to review programs
- Share information with new officers and committee chairpersons
- Consider having an appreciation night for officers, committee chairpersons, committee members and ladies that worked to make your year successful *(This could be a special evening with drinks and refreshments, a buffet/dinner, picnic or dance with refreshments)*

***Congratulations, Past Exalted Ruler -
You are now a Local Lodge Advisor!***



SUCCESSFUL LODGE & CLUB OPERATION ***(P.R.O.F.I.T.)***

- People:*** The most important single element of an organization or activity is its people (members). An organization cannot grow or be successful without the participation and support of its members.
- Responsibility:*** The effective and proper use of the members (and officers) depends upon placing responsibility wisely. You must depend upon them -- you must have faith in their ability.
- Open-Minded:*** You must be always open-minded. After you have placed responsibility, you must be willing to accept the fact that others may think and do things in a manner different from yours. You must be willing to seek advice, to have confidence in the wisdom and counsel of others and be willing to listen to their views and ideas.
- Follow-Thru:*** Once a course of action is decided upon, take the necessary steps to carry out the activity or plan. See it thru--do not vacillate, discard unwise approaches.
- Initiative:*** Create the desire in people to use their own initiative to make things work--to achieve good performance--to try something new and different. The definition of initiative is the agility of original concentration and independent action.
- Teamwork:*** Only thru effective leadership can teamwork be achieved. This means that you must have gained the respect upon which you depend to accomplish specific tasks. There is little assurance of success in a lodge without teamwork. Unity of action by all involved members of the lodge is vital to success and without cooperation you can be assured of a mediocre or less successful operation.