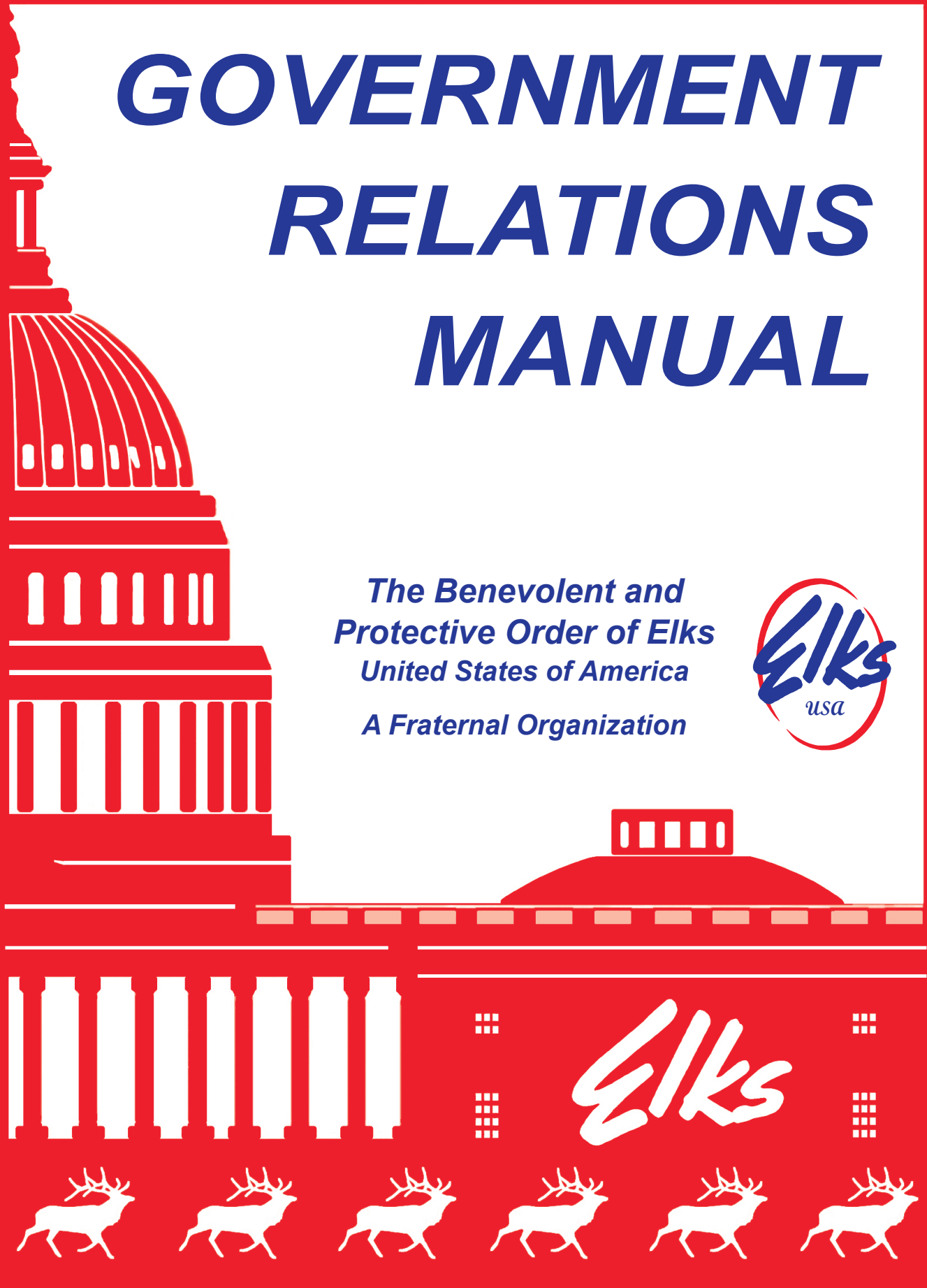


# ***GOVERNMENT RELATIONS MANUAL***

*The Benevolent and  
Protective Order of Elks  
United States of America  
A Fraternal Organization*



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## I. INTRODUCTION

### FIRST AMENDMENT TO THE UNITED STATES CONSTITUTION

*“Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof or abridging the freedom of speech or of the press; or the right of people peaceably to assemble, and to petition the government for a redress of grievances.”*

This has been interpreted [US Supreme Court Justice Douglas, 1972], as “ ... the First Amendment and the related guarantees of the Bill of Rights ... create a zone of privacy, which precludes government from interfering with private clubs or groups.”

Thus, the First Amendment to the Constitution of the United States establishes our right to exist as a private organization.

### MISSION STATEMENT OF THE GRAND LODGE GOVERNMENT RELATIONS COMMITTEE

*The mission of the Grand Lodge Government Relations Committee is to guide the Grand Lodge of the Benevolent and Protective Order of Elks, its State Associations and its Local Lodges, in protecting and preserving the right to exist as a private, nonprofit, charitable organization, a status our great Order has enjoyed since our formation in 1868.*

The work being done by your Government Relations Committee, although not glamorous, is essential to maintaining our status as a non-profit, tax exempt, private charitable organization, and is vital to the very survival of our Great Order. We need the support and assistance of each and every Member. The tremendous amount of work required to achieve its mission cannot be accomplished by the committee alone. Therefore, it is the responsibility of every single Member to help us meet these goals and protect the status of our Order as the greatest nonprofit, private charitable organization in the United States of America.

### PRIMARY ACTIVITIES OF THE GRAND LODGE GOVERNMENT RELATIONS COMMITTEE

There are five main functions of the Grand Lodge Government Relations Committee that, if diligently performed, will guarantee our Lodges will continue to thrive and perform great works of charity in their communities on into the future. Those five functions are:

#### 1. CHARITABLE REPORTING.

Our committee is charged with ensuring that the tremendous amount of charitable work being done by our Members, Local Lodges and State Associations is fully, completely and accurately maintained throughout the year and reported as part of the Grand Lodge Annual Report.

#### 2. MONITOR LEGISLATION AND LAWS.

Equally as important, the committee is the watchdog of the Order. Committee Members keep a constant vigil for any proposed legislation or governmental action that might in any way affect our Order.

*“The price of liberty is eternal vigilance.”*

### 3. ADVOCATE FOR OR AGAINST LEGISLATION WHERE NECESSARY.

Whenever necessary, our committee will advocate for proposed legislation that would help our Lodges and, on the contrary, take action to oppose any legislation or governmental action that would adversely affect the ability of our Lodges to operate. In addition, our committee will take steps to change existing laws when necessary for the benefit of the Order.

### 4. PROMOTE PROGRAMS FOR POSITIVE INTERACTION BETWEEN LODGES AND THEIR ELECTED OFFICIALS.

This committee also guides Lodges on promoting positive interactions and ties with federal, state and local officials and agencies.

### 5. EDUCATE MEMBERS ON PUBLIC ACCOMMODATION AND OTHER LAWS.

Our goal is to educate our State Associations and Lodges about existing laws that directly affect their day-to-day operations and how to comply with these laws and regulations.

## II. CHARITABLE REPORTING

### A. CHARITABLE REPORTING IS ESSENTIAL

Charitable reporting is one of the keys to the very survival of our great Order. The Government Relations Charity Statistics, once compiled, represent the only tangible, documentary proof of the total dollar value of all charitable work of Elks nationwide. Showing in dollars and cents just how much charitable work our Lodges account for in their jurisdictions gives our Order tremendous leverage with our elected officials. The statistics, once compiled, are used to make sure local, state and federal officials are aware of the tremendous positive impact the Elks are to their states, communities and constituents.

Each year our Lodges and State Associations account for more than \$350 million of documented charitable work nationwide. Because of our charitable reporting requirements, unlike any other organization, we have tangible documentary proof. The sad part is our committee estimates that only half of the work being performed by our Members actually gets reported. **We do the work; why not get the credit!**

That is why it is essential that Members, Lodges and State Associations keep complete and accurate records of all the charitable work being done by the Members.

### B. ACTIVITIES THAT MUST BE REPORTED

Complete instructions regarding who is required to report, what information is required to be reported and how to report are contained in the Grand Lodge "Charity Records Workbook," which is mailed annually to Lodges and also available for download at <https://www.elks.org/leadership/manuals.cfm>. We ask all Members to be familiar with the instructions contained in that manual for online filing of Lodge charity records.

Despite the filing instructions, there is typically a lot of confusion concerning what activities must be reported. There really should not be any confusion; it's simple: Members must report any time they spend, the miles they travel, expenses they incur and cash contributions they make working on the "charitable, patriotic, civic-minded or community-related projects or activities." "Only charitable activities" need to be reported. Therefore, no records need to be kept for non-charitable committee work such as work done on auditing, membership, Chicago Lodge Membership System, etc.

Here are the charitable committees that are required to report with some examples of activities that should be reported. This list should help with any questions you may have about what needs to be reported. However, please note the list is not all-inclusive; your Lodge, district or state may have other charitable activities they perform. The rule to follow is all work performed for charitable, patriotic, civic-minded or community-related purposes should be reported.

- A Americanism:** All Americanism and patriotic programs should be reported. Report on line 1301 – Patriotic Programs.\*
- B Army of Hope:** Any activities for AOH, in support of the troops or in support of returning soldiers should be reported. Report on line 1403 – Veterans Service Army of Hope Programs.\*
- C Antlers:** Any activities involving starting an Antlers Program or maintaining an Antlers Program or assistance provided with running their events and meetings should be reported. Report on line 1005 – Antlers Program.\*
- D Drug Awareness:** All activities (for example, sponsoring Safe Nights, National Night Out activities, handing out materials or having Elroy at public events) should be reported. Report on line 1801 – Drug Awareness Programs.\*
- E Special Needs Programs:** Anything done by Members to assist our Special Needs Children and Adults. Report on line 1202 – Special Needs Programs.\*
- F Hoop Shoot:** All time spent planning, making contacts and setting up and running the event should be reported. Report on line 1102 – Hoop Shoot.\*
- G National Foundation:** Report on line 1701 – Elks National Foundation Donations.\*
- H National Veterans Service:** All time spent, and activities held, to support our veterans should be reported on line 1401 – Veterans Service Events.  
**NOTE:** Adopt-A-Veteran Program should be reported on line 1402 – Veterans Services Adopt A Vet.\* •Army of Hope activities should be reported on line 1403 – Veterans Service Army of Hope.\* •Welcome Home activities should be reported on line 1404 – Veterans Service Welcome Home.\* •Stand Downs should be reported on line 1405 – Veterans Service Stand Down.\* •VA Facility Support should be reported on line 1406 – Veterans Service Facility Support.\*
- I Leadership or other Youth Week activities:** Report on line 1004 – Youth Activities.\*
- J Scholarship:** All time spent contacting the schools, distributing applications and materials, and judging applications, should be reported. The dollar amount of scholarships given should be reported as cash contributions. Report on Line 1001 – Youth Scholarships.\*
- K Youth Activities:** They all should be reported, for example, Lodge children’s holiday parties, and sponsoring field trips and kids to camp, etc. Report on line 1004 – Youth Activities.\*
- L Youth athletic programs & Soccer Shoot:** All athletic programs for the youth should be reported. (Examples: Batters Up, sponsoring teams in Little League or peewee football, etc.) Report on line 1101 – Youth Athletic Programs.  
**NOTE:** Soccer Shoot activities are reported on line 1103 – Soccer Shoot.\*
- M Activities for your State Major Project:** Anything done to support your State Major Project should be reported. Report on line 1204 – State Major Project.\*



- N Parades:** Participation in Parades, Report on line 1301 – Patriotic Programs.\*
- O Student of the Month/Year:** Report on line 1002 – Student of Month/Year.\*
- P Scouting Programs:** Sponsoring Scout Troops, Eagle Scout/Girl Scout awards. Report on line 1003 – Scouting Programs.\*
- Q Community Service Donations:** (Adopt a road, erecting public monuments, buying bulletproof vests for the police or supporting the local volunteer fire department or ambulance corps, etc.) Report on line 1501 – Community Service Donations.\*
- R Sponsoring Health Fairs/Blood Banks:** Report on line 1502 – Health Fairs/Blood Banks.\*
- S Donating use of Lodge facilities:** (examples: Little League, Lions Club, Rotary Club, Scouts, Antlers or other nonprofit groups). Report on line 1503 – Lodge Facilities Donated.\*
- T Senior Citizen programs:** Report on line 1504 – Senior Citizen Programs.\*
- U Food Basket programs or support of local pantries:** Report on line 1505 – Food Basket Programs.\*
- V Natural Disaster Relief:** Any such activity should be reported on line 1508 – Natural Disaster Relief Program, Inc.\*
- W Public Service/Citizen Recognition Programs:** (e.g., civic awards for First Responders and outstanding citizens, etc.) Report on line 1601 – Public Service/Citizen Recognition.\*

*\*(The line numbers and title of each item above identify the section in the “Charity Records Workbook” to report each activity.)*

**Who should report.** Of course every Member or Chairperson should report anything they do individually for charity; however, generally the event chairperson or organizer should report all time spent, miles traveled by volunteers, and expenditures and cash contributions.

**Information required to be reported.** Members should keep track of time spent, miles traveled, non-cash contributions (i.e. expenses incurred) and any monetary contributions made when performing charitable, patriotic, civic-minded activities.

**Reporting for non-member helpers.** Many times our Members are assisted by their nonmember spouses, children or other non-Elks in running the charitable events or working on our charitable endeavors. Please note, the same information should be kept and reported for any non-Elks who helped.

**Planning, setup and cleanup time.** When reporting charitable activities, include time spent planning, organizing, shopping for, setting up or cleaning up after the event or activity as well as time spent holding the event.

**Attendance at Grand Lodge and State Association Conventions.** An Exalted Ruler or other attendees can report their attendance at the Grand Lodge and State Association Conventions, BUT ONLY for time where charitable committees and activities were discussed. The committee estimates that one half of the hours spent in business sessions at Grand Lodge and State Association conventions involve charitable committee work and reports. Therefore, we believe you can account for the miles traveled to and from such conventions and one half of the hours spent in business sessions.

Also note, if any of your Members work a charitable booth at the conventions, such as for your State Major Project, Drug Awareness, Americanism, Youth Activities etc. they can report their travel to and from the conventions as well as time spent setting up, working at or breaking down the booth.

**District, Regional and State Chairpersons of Charitable Committees.** Lodge, District or State Chairpersons of charitable committees should report their miles traveled and time spent attending committee meetings, DD clinics, VP clinics and any other meetings involving these charitable committees. Again, refer to the “Charity Records Workbook” for information, or contact your Area Committee Member. **Note** – Lodge Chairpersons, committee members, and volunteers report to the Lodge. District and State Chairs and volunteers report to the State.

### C. HOW TO REPORT YOUR CHARITABLE ACTIVITIES.

All Lodge charitable statistics should be reported monthly to the Lodge Secretary. Therefore, Members should keep track of the time they spend, miles traveled and expenditures made for charity throughout the month. The committee has an electronic file of an Excel spreadsheet (*Appendix 7*) available to keep track of time spent, miles traveled, and expenditures and contributions. Just keep a simple running log of your figures, and email the spreadsheet monthly to the Lodge Secretary who can report the information through CLMS.

For Members who would prefer to keep their records with paper and pen, the committee has a survey form (*Appendix 8*) to fill out and give to the Secretary to report through CLMS.

Copies of the Excel worksheet and Survey Form can also be obtained by contacting your District, Regional or State Committee Chairperson.

**Reporting requirements for District and State Committee Chairpersons of “charitable committees” as well as District Deputies and State Association Officers.** State Associations shall require District and State Committee Chairpersons, State Officers and District Deputies to report their activities monthly to the State Secretary and/or the Association Government Relations Committee. The State Secretary is ultimately responsible for filing the Association Annual Charity Report with Grand Lodge.

Keeping track of and reporting our charitable work takes little time and effort. We do the work so let’s make sure we get the credit!

### **THE GOAL IS 100 PERCENT REPORTING!**

The goal is to have 100 percent of Members who are required to report, report 100 percent of their charitable activities. With your help we can meet that goal.

### **III. KEEP A CONSTANT VIGIL FOR CHANGES IN THE LAWS**

This is one of the most important functions of the Grand Lodge Government Relations Committee. Each day when Congress is in session, it proposes laws or changes to existing laws. So do state legislatures, and county and municipal governing bodies. Administrative bodies like those that govern Alcohol Beverage Control or bingo, raffles and games of chance, in all the 50 states constantly change their rules and regulations. The IRS and even the U.S. Postal Service continually revise their rules and regulations governing nonprofit organizations such as the Elks. These constant changes directly affect our Lodges and Order. We must keep constant vigil for new or changing federal, state and local legislation that would in any way affect our Lodges.

Despite our diligence, it is impossible for the eight-members Grand Lodge Government Relations Committee to keep watch for proposed legislation in all 50 states and their counties, parishes, municipalities and administrative agencies. Therefore, the duty of every Member is to help with this vigil.

There are many ways to monitor laws in your jurisdiction. Reviewing newspapers is a start, but adequate coverage is usually not available. Legislative activity can be monitored on-line, often in real-time. The legislature of each of the 50 states maintains a website (*Appendix 1*) where action on bills can be followed.

Of course, the best way to monitor legislation is in person. Many Lodges have Members involved in law or government. Ask them to keep the Lodge apprised of changes in the law.

### **TAKE ACTION WHEN NECESSARY**

If you become aware of proposed changes in the law that would affect us, immediate action is necessary. To succeed in supporting or opposing legislation, start your efforts as soon as the legislation is being considered. The best time is while the legislation is in committee. Testifying before the committee can have major impact on the legislation. But you need to know what is being drafted and proposed as soon as possible.

Much work of legislative bodies is done in committee and public hearings between legislative sessions. Often these are opportunities for Elks to be heard. Watch newspapers and the Internet for scheduled meetings and hearings, and try to contribute.

If adverse legislation or governmental action is proposed in your jurisdiction, our committee needs to be made aware of it as soon as possible. But we caution you to follow the chain of command. First, discuss the issue with your district, regional and/or state Government Relations Committee chairpersons as the situation warrants. Your state committee chairperson with the advice of the State Sponsor will decide whether to involve members of the Grand Lodge committee.

If warranted, our committee is ready to help any Lodge or State Association organize support for laws favorable to our Order and oppose those that are not .

Again, only with the advice of your State Sponsor and leaders, should individual Members and Lodges ask legislators for their support. Members should be coached on how to write letters, make phone calls, etc. (*Appendixes 2 and 3.*)

All contacts with public officials should be factual, calm and considerate. Even if the legislator does not agree with the Member on the matter at hand, there will be other issues in the future where the legislator may be asked for help again. We must not forgo tomorrow's cooperation because of frustration over an issue today.

*(Guidelines for face-to-face meetings with legislators, Appendix 4)*

## **IV. LAWS OF CONCERN TO OUR COMMITTEE**

### **A. UNRELATED BUSINESS INCOME TAX (UBIT)**

Of most concern to our committee are IRS codes relating to "Unrelated Business Income Tax" (UBIT). The code essentially states:

Even though an organization is recognized as tax exempt, it still may be liable for tax on its unrelated business income. For most organizations, unrelated business income is income from a trade or business, regularly carried on, that is not substantially related to the charitable, educational, or other purpose that is the basis of the organization's exemption. An exempt organization that has \$1,000 or more of gross income from an unrelated business must pay tax on that income.



One example of its effect: A Lodge may regularly sell advertising space in its monthly newsletter. Because selling advertising space is a commercial activity and “regularly carried on,” income to the nonprofit from advertising is most likely taxable even if the nonprofit uses that income to advance its charitable purposes.

UBIT can have a financial impact on certain Local Lodges who conduct unrelated business activities. The law is designed to protect against charitable organizations that engage in business for profit under the guise of nonprofit status. Fortunately, the majority of our Lodges have little or no unrelated business income and thus little or no UBIT.

The issue with the law is that the \$1,000 threshold is antiquated. It has been the same for decades and should be updated and increased. The Government Relations Committee has participated in the Order’s attempts to have this law changed and the \$1000 threshold increased, but to date those attempts have failed. If the threshold could be increase to a realistic number UBIT would be a non-entity in almost all Lodges. As opportunities become available for possible change in tax law and the \$1000 threshold, the committee will again become involved and try to get positive results for the Lodges with UBIT.

UBIT is reported annually by virtue of filing an IRS 990T, all lodges are required by IRS and Grand Lodge to file a 990 or 990T for each fiscal year. It is recommended that all Lodges file an IRS 990T each year (not a 990) even if the Lodge has no UBIT.

## **B. OTHER LAWS OF CONCERN AND SHOULD BE WATCHED CLOSELY**

Lodges and State Associations should also become familiar with the following laws as they affect day-to-day operations and fundraising. Legislation in these areas historically has had the most significant effect on our Lodges and therefore should be monitored closely. (*Note, these words can often be used to search proposed legislation reported on legislative websites.*)

**Laws against discrimination and harassment** – Lodges are strongly advised to review the “Discrimination and Harassment Guidelines for Local Lodges” manual to establish a written policy against discrimination and harassment in your Lodge. The manual may be downloaded at <https://www.elks.org/leadership/manuals.cfm>.

**U.S. postal regulations as they affect postage rates** – In reference to our newsletters and publications.

**Sales tax and exemptions** – Sales tax laws differ state-by-state.

**Alcoholic Beverage Control rules and regulations** – Which govern permits, licensing and establish liability and penalties. All Lodges should be familiar with their local laws.

**Bingo Raffle and Games of chance rules and regulations** – Nearly all our Lodges are affected by these rules in their states and localities.

**Property tax exemption laws** – Be familiar with your local laws and take advantage of these exemptions if possible.

## **PROGRAMS TO PROMOTE POSITIVE INTERACTION WITH ELECTED OFFICIALS**

Another important function of the Grand Lodge Government Relations Committee is to assist Lodges and State Associations in promoting positive interaction and ties with federal, state and local officials and agencies.

It is far more effective if your elected officials know about the Elks, what we stand for and the charitable work we do, *before* we request their support for legislation. There are many ways to do this. We strongly recommend all Lodges invite their elected officials to Lodge events such as: youth banquets, awards presentations, Flag Day ceremonies, holiday food basket distributions or events honoring veterans and active military.

When you invite public officials to your Lodge, treat them with respect. Give them an opportunity to speak if warranted. Seat them with individuals with whom they will be comfortable. Accommodate their schedules. If they need to leave early let them speak earlier than planned.

State Associations are encouraged to invite state officials or governors to their conventions and events. A State Association should also host open houses in Lodges located in capital cities. All state legislators should be invited for light refreshments or possibly dinner. Displays featuring the State Association Major Projects and Local Lodge programs should be prominently displayed. Qualified Elks should be on hand to answer questions, provide explanations and speak about our programs and our needs as a private organization.

Several State Associations hold annual events at their capitols when the legislatures are in session. They set up displays showing the charitable work of their association and Lodges. They invite the legislators to stop for refreshments. These types of events can be a hit. Those Associations literally expose all of their states' elected officials to what the Elks do at one time.

### **MAKE SURE YOUR ELECTED OFFICIALS KNOW JUST HOW MUCH CHARITABLE WORK IS DONE BY THE ELKS**

This point really requires no explanation. All Lodges and State Associations perform amazing amounts of charity for our youth, our special-needs children, our soldiers, our veterans and those less fortunate. These are the things we are most proud of, the reasons we all joined, along with staying active. So it's simple, make sure these nonmember public officials know all the great works we do. In other words, brag about our charity.

Don't be afraid to give your elected officials the year-end state and national charitable statistics compiled by the Government Relations Committee. The whole purpose of maintaining these records is to publicize the astounding amount of work done by our Order, and to make sure our public and elected officials are well aware of just how important the Elks are to their jurisdictions and constituents. Your local officials surely know the Elks do charitable work, but we guarantee they are not aware of the actual cash value of the charitable work the Elks do. When they see the compiled numbers, they will be astounded. The statistics should be mailed to your public officials, or better yet publicly presented to them with when they visit your Lodge.

### **KNOW WHO YOUR PUBLIC AND ELECTED OFFICIALS ARE**

We recommend that all Members know their local, state and national representatives. Campaign literature and websites listing them are available (*Appendix 1*). Learn as much as you can about each of them – personal, schools, interests, other organizations, etc. Monitor the bills they support or oppose, and so on.

### **COMMEND AND THANK LEGISLATORS**

Be sure to thank legislators when they support our interests, even if not successful. We have a tendency to contact our legislators only when we want something. We need to thank them when they try.

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## V. STRUCTURE OF THE COMMITTEE AND RESPONSIBILITIES

### GRAND LODGE ADVISORY COMMITTEE

The Grand Lodge Government Relations Committee is overseen by one or more Sponsors selected by the Grand Lodge Advisory Committee. These individuals attend the various committee seminars and meetings, and approve various committee initiatives.

### GRAND LODGE COMMITTEE MEMBERS

The Grand Lodge effort is carried out by the Grand Lodge Government Relations Committee, which is composed of eight members, one for each of the designated Grand Lodge Areas nationwide. Each year, a Member is selected as Chairman by the Committee's Grand Lodge Advisor. Members of the committee monitor, assist and provide information to the State Association Chairpersons in their respective areas. Information, initiatives and programs are disseminated from the Grand Lodge Chairpersons to the State Chairpersons in their area.

### STATE CHAIRPERSONS

State Association Chairpersons are responsible for distributing information to the district chair people in their state and seeing that the committee programs and requirements are met. They should monitor state legislation and look for state laws that need to be changed. Any proposed legislation discovered by the State Chairs should be first shared with their Grand Lodge Area Members.

State Chairpersons should assist their State Association Secretaries and others with completing the Survey of Volunteer, Youth, Charitable and Community Service Programs for activities of the State Associations. State Chairs will receive the charity records of the Annual Report from every Lodge in their state and from their State Association Secretary so they may review what is being submitted to Grand Lodge. This will enable them to follow up with Lodges on the quantity, quality and timeliness of data submitted. State Chairs also need to provide information and pertinent data about Elks activities to their federal and state officials continually to ensure they understand what our goals are and what we are doing for their communities and municipalities. *Appendix 9* offers a guide for planning monthly activities.

State Chairpersons are encouraged to attend DDGER Clinics, New Officer Clinics, State, Regional Meetings and Seminars to inform those present why the Government Relations Committee is important to all Lodges and why they should be alert to issues that could affect our Order. They should also discuss the importance of Charitable Reporting and be prepared to answer reporting questions that the attendees may have.

State Chairpersons are instrumental in making sure that all State and District Chairs are properly compiling their Charitable Reporting for State Charitable Activities. They should provide and/or assist in training at all levels on proper charitable reporting and provide them copies of, or give access to the Government Relations Monthly Reporting Form (Appendix 7) and make sure that monthly charitable information is being reported and turned over to the State Secretary.

### DISTRICT CHAIRPERSONS

District Chairs are a direct link between Local Lodge and State Chairpersons. They should monitor the legislative activity of their local governments, encourage active involvement of the Lodges in their Districts and contact legislators in their Districts, providing them with pertinent Elks' information to ensure they understand what the Elks do in their respective communities. *Appendix 9* offers a guide for planning monthly activities.

District Chairs are also instrumental in making sure that all Charitable Reporting for State Charitable Activities is being properly compiled and submitted monthly. They should assist as they can and be sure that those required to report have access to the Government Relations Monthly Reporting Form (Appendix 7), are using it, and are making the required monthly charitable reports.

### LOCAL LODGE CHAIRPERSONS

The key to an effective Elks Government Relations Program starts with the Local Lodge Chairpersons. They must establish contact with their area legislators, providing them with pertinent information and charitable data concerning various Elks activities. Invite them to Lodge events such as Flag Day, Scholarship Dinners, Youth and Drug Awareness activities, Veterans events and other appropriate functions.

Lodge Chairpersons should also encourage Elks Members to contact their legislators on key issues. They must work with their Lodge Secretaries, Lodge Officers and all Committee Chairpersons to ensure all data for the Survey of Volunteer, Youth, Charitable and Community Service Programs are compiled and filed at <https://www.elks.org/clms2web> (*Exhibit 6*). Lodge Chairs must keep their District and State Chairs apprised of what is happening in their Lodges and areas of jurisdiction in regards to government relations activities, including legislation that could affect our organization. Lodge Chairs should use *Appendix 9* as a guide for planning their monthly activities.

Local Lodge Chairpersons are instrumental in making sure that the members of their Lodge are properly compiling their Charitable Reporting. Local Lodge Chairpersons should provide training to the chairpersons of the various Lodge committees on proper charitable reporting and provide them copies of, or give access to the Government Relations Monthly Reporting Form (Appendix 7). Local Lodge Chairpersons should follow up with all Lodge committee chairpersons to make sure that the charitable information is being turned over to the Lodge Secretary.

### LODGE AND STATE ASSOCIATION SECRETARIES

*(The unofficial members of the committee)*

Finally, while Lodge and State Association Secretaries are not formal members of the Government Relations Committee, they are integral to the reporting process. They must physically enter the charitable statistics at <https://www.elks.org/clms2web> (*Exhibit 6*).

Most Lodge Secretaries look at this as extra work. Therefore, we strongly recommend that you treat them with respect. Solely at the discretion of the Lodge Secretary, the Lodge Secretary may grant rights in CLMS for any member of the Lodge to assist in the entering of the Lodge's charitable reporting.

Give the Lodge and State Secretaries the required information monthly or well in advance of their reporting deadlines to give them plenty of time to enter the data. *Do not* wait until the day before deadline to give them a full year of information and expect them to enter it all at the last minute. Please be considerate of the job they do.

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## **USING THE INTERNET TO FIND ELECTED OFFICIALS**

By entering your zip code, you can find the names and addresses of State and National legislators at <https://www.congress.gov/state-legislature-websites>. Besides identifying legislators, there is frequently a short biography, a list of committees on which legislators serve, their e-mail address and website URL.

## **MONITORING LEGISLATIVE ACTION VIA THE INTERNET**

Most states have websites with links to legislative sites that list pending legislation. Those websites frequently provide summaries or the complete text of the proposals.

Often a search using key words is possible so that all bills relating to a specific topic of interest can be reviewed online and downloaded/printed if desired.

One way to get to State Home Pages is:

<https://www.usa.gov/states-and-territories>

Other informational websites you may want to visit:

<https://www.usa.gov>

This is a great link that leads to many government websites.

<https://www.congress.gov>

This website is a great tool to research information on congressional legislation and its current status. In addition, all the background material is included on bills, votes taken, sub-committee actions, etc.



**TIPS ON WRITING TO A LEGISLATOR OR PUBLIC OFFICIAL**

Legislators and politicians pay close attention to their mail. Responding to mail is crucial to reelection, and legislators know your vote can be won or lost by their response. The most effective letter is a personal one, not a form letter. It should be concise, informed, polite and as short as possible. Some specific tips are:

1. Identify yourself as a constituent and member of an interested organization.
2. Make every effort to identify the bill number and author if possible.
3. Try to stay to one typewritten page, two at most. Don't write on the back of a page. If writing longhand, do so legibly. Use a reference header (Ref) at the beginning of your letter to quickly identify the legislation of interest.
4. Limit your letter to one subject.
5. Give reasons for your position in your own words.
6. Avoid sending a form letter. Convert such letters to your own words.
7. Raise questions. By doing so, you can expect a reply.
8. Be polite and persuasive. No name-calling or threats.
9. Be sure your name and address are legible.
10. If your legislator does something that pleases you, write and compliment him/her.
11. Suggested address style:

The Honorable John/Joan Doe  
 United States Senate/House of Representatives/State Senate/  
 House of Representatives or Assembly  
 State Capitol  
 Washington, D.C. 20510/Capitol City

Dear Senator/Representative or Assemblyman/woman,

Your Name  
 Address

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## Sample Letter to Legislator



City, State, ZIP  
Phone/FAX Numbers

Date

The Honorable Peggy Hamric  
Texas House of Representatives  
P. O. Box 2910  
Austin, TX 78768-2910  
Fax 512/463-5896  
REF: SB 432

Dear Representative Hamric:

I am writing to encourage you to work to defeat or substantially modify SB 432. As a resident of your district and a member of XXX Elks Lodge that conducts charity bingo, I oppose SB 432 because it would significantly handicap small games like ours and instead further increase the advantage of large commercial halls.

Our Lodge uses bingo proceeds to support our charities including aid to handicapped children, baskets of food and gifts at Christmas for the needy and scholarships for deserving young people. Our hall is small and we cannot compete with the commercial halls that seat hundreds. We only offer friendly, caring volunteer workers. If the commercial halls are given added advantages as SB 432 would do, we will probably be forced out of bingo.

Besides organizations like ours, SB 432 would adversely affect numerous churches, various volunteer groups, and I feel the community in general. I urge you to work to either significantly amend SB 432 (Representative Dan Kubiak has drafted sound amendments) or to defeat it. If you have any questions please do not hesitate to contact me by letter, fax, or phone.

*Very truly yours,*

Typewritten Name



### **TIPS ON MEETING WITH A LEGISLATOR OR PUBLIC OFFICIALS**

A personal visit with a legislator is an effective way to emphasize your interest in an issue or bill. Here are tips for meeting a legislator to urge support or opposition to legislation:

1. Make an appointment, state the subject to be discussed, the time needed, and identify persons who will attend. When calling the legislator's office, give your full name and address. Also a good idea is to ask the name of the person with whom you are speaking.
2. Identify whether or not you reside in the legislator's district. Make every effort to have one of his/her constituents make the contact.
3. Select a spokesperson if others are going with you, and agree on your presentation. Again, a member of the legislator's district should attend.
4. Know the facts of both the legislation and your position on the issue. If referencing a bill, know the number and title.
5. Present the facts in an orderly, concise, positive manner.
6. Relate the positive impact of legislation you support and problems it corrects.
7. Relate the negative impact of legislation you oppose and suggest, where appropriate, a different approach.
8. Leave fact sheets if possible.
9. Ask for favorable consideration, thank the Legislator for his/her time and courtesy, and leave promptly.

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## **STATE GOVERNMENT RELATIONS CHAIR GUIDELINES FOR FILING CHARITABLE DATA FOR THE ANNUAL REPORT**

Government Relations State Chairpersons will receive charitable-giving data of the Annual Report in the April-May time frame each year from every Lodge Secretary and the State Association Secretary in their State.

Through the various communications networks used in the State Associations, State Government Relations Chairs should follow up on their Lodges and State Association that do not input the data at Elks.Org. State Secretaries are to file their charitable statistics at <https://www.elks.org/members/statesecys/stateCharityReport.cfm> not later than May 1 of each year.

In addition, State Government Relations Chairpersons should review these reports for quality, quantity and level of completion, and follow up with Lodges and/or their State Association on reports that have apparent discrepancies or appear incomplete.

State Chairs should assist their Lodge Chairs/Secretaries as well as **the** State Secretaries with filing the charitable statistics portion of the Annual Report, if needed.

Annually, Grand Lodge will provide a summary of the compiled data of all charitable activities filed on the Annual Reports. This will be distributed to State Government Relations Chairs through the Area Members of the Grand Lodge Committee and cognizant members of the Grand Lodge as soon as practicable after the May 1 filing.

The compiled statistics should be circulated to all lodges and be used for public relations purposes to make our communities and local state and federal officials are aware of the amount of charitable work being done by the order and the individual Lodges.



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Local Lodge **Secretaries** are required to file their annual Local Lodge Volunteer, Youth, Charitable and Community Service Programs report at

<https://www.elks.org/clms2web>

From there, click on "Roster" for the screen pictured below. Then click on "Update Charitable Giving data," where the finger is pointing:

Lodge: 9999 Year: 2023 Letter: [\*] RecordType: [M] Filter: [\*] Status: [A] Name or Number: [] Sort: Name Sort Data: [membership1]

### CLMS2Web Control Panel

**Membership Candidates:**

- [Add a Membership Candidate](#)
- [Process Membership Candidates](#) (1)
- [Process Incoming Transfers](#) (0)

**Other Record Types:**

- [Add a new Associate Member](#)
- [Add a new Stray Elk](#)
- [Add a new Widow\(er\)](#)
- [Add a new Protocol Member](#)
- [Add a new Vendor](#)
- [Add a new Auxiliary Member](#)
- [Add a new Lodge](#)
- [Add under-age Child of Active Member](#)

**Lodge Stats:**

Active Members:	250
Candidates:	1
Pending Transfers:	0
Delinquents:	16
Flagged Records:	0
<b>Full Membership Stats</b>	

**Alerts:**

- [Display All Alerts](#) (0)
- [Flagged Records](#) (0)
- [Pending Outgoing Transfers](#) (0)
- [Pending Incoming Transfers](#) (0)
- [Pending Submissions](#) (0)
- [Membership Inquiries](#) (0)
- [Leadership Inquiries](#) (0) **New**

**Delinquent Members:**

- [Drop for Non-Payment](#) (0)
- [All Delinquents](#) (16)


**Membership Dues:**

- [Process Dues Payments](#)

**Quick Dues Payment**

Membership Number:

**Grand Lodge Submissions:**

- November report submitted. [\[View\]](#)
- Click the button below to preview your Annual Grand Lodge Membership Report, which will be submitted AUTOMATICALLY on April 1st.
- (Preview available starting 3/1/2023)
- [Confirm Officers and Committee Assignments](#)
- [Submit New, Renewal or Replacement ER/Secretary](#)
- [Confirm/Update Lodge Info](#)
- [Confirm/Update PER List](#)
- 

Last Changed Data: **02/03/2023 12:10 PM** **Important!** Remember to periodically [review your staffer appointments](#).

[CLMS Terms of Service](#)  
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### Appoint Local Charitable Report Coordinator

Charitable Report Coordinators are responsible for submitting local charitable event data.

Charitable Report Coordinators must have an elks.org user name and password. See the drop down menu below to determine if your appointee already has one. If not, please have them register online. Note that per Grand Lodge Guidelines, your Local Charitable Report Coordinator should be a member of your lodge.

[Select LocalCharitable Report Coordinator Appointee] v

If your appointee does not yet have an elks.org password, [please click here to have CLMS automatically create an elks.org user name and password for your appointee](#).

### Current Local Charitable Giving Coordinators

Name	Last elks.org visit	Email
Quincy P. Elk (0123/456789)	02/06/2023 10:31 AM	elkdom@elks.org

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## Data Collection Survey of Volunteer, Youth, Charitable and Community Service Programs

Committee: \_\_\_\_\_ Date: \_\_\_\_\_

- (A) Program: \_\_\_\_\_
- (B) Number of Participants
- (C) Number of Elks
- (D) Number of Helpers
- (E) Total Elk Hours
- (F) Total Helper Hours
- (G) Elk Miles
- (H) Helper Miles
- (I) Non-Cash Contributions
- (J) Cash Donations

- Column (A)** Describe Program
- Columns (B) thru (D)** Count individuals — not couples, teams or groups.
- Columns (E) and (F)** Indicate total hours — If 6 Elks worked 6 hours ( $6 \times 6 = 36$  total hours)
- Columns (G) and (H)** Mileage traveled in preparation for an event itself.  
(Number of people times round trip miles.)
- Column (I)** Cash value of contributions including hall donations, food, band, clothing, bingo, parties, gifts, eyeglasses — Do not include hours or mileage.
- Column (J)** Actual cash, checks, money orders or purchase value of savings bonds donated.

Submitted by: \_\_\_\_\_

*Must be completed and returned to the Secretary by the meeting following the program.*

***“Elks Care — Elks Share”***

## Appendix Page 9

MONTHLY REMINDERS FOR COMMITTEE MEMBERS TO TAKE ACTION ON ✓	
<b>APRIL</b>	
1.	Develop a plan for the government relations effort for the Lodge fraternal year.
2.	Invite a Legislator or a Community Official to speak at Flag Day in June.
<b>MAY</b>	
1.	Invite a Legislator or Community Official to speak at a 4th of July event.
2.	Follow up with Lodges who have not provided Annual Report Page 2 summaries.
<b>JUNE</b>	
1.	Send summary of Volunteer, Youth, Charitable and Community Service Programs to Legislators and local Government Officials and your local newspaper for local publicity.
<b>JULY</b>	
1.	Make sure that your local Lodge is represented at the Elks National Convention. Try to obtain local publicity about the National Convention and who is attending.
<b>AUGUST</b>	
1.	Invite Legislators or local Government Officials to speak at September Lodge events.
<b>SEPTEMBER</b>	
1.	Plan your Veterans Remembrance Programs for November. Invite a Legislator or a local Government Official to speak at your Veterans Day Ceremony or Veterans Programs in November. Inform the local news media of your plans.
<b>OCTOBER</b>	
1.	Check to see if your Lodge can be of assistance in helping the elderly and handicapped get to the polls to vote.
<b>NOVEMBER</b>	
1.	Send congratulatory letters to newly-elected and reelected Legislators and local Officials; enclose charitable records survey data and other informational material about the Elks.
2.	State and local Lodge Chairpersons make master list of addresses, phone numbers, fax numbers and e-mail addresses of Legislators in their respective Areas.
<b>DECEMBER</b>	
1.	Invite Legislators and local Officials to be present when holiday food baskets are distributed.
<b>JANUARY</b>	
1.	Send summary of Survey of Volunteer, Youth, Charitable and Community Service Programs to Legislators/local Officials and the news media.
<b>FEBRUARY</b>	
1.	Lodges in capitol cities hold a coffee or an open house at the capitol city Lodge for Legislators and community leaders.
<b>MARCH</b>	
1.	Invite Legislators or local Community Officials to Youth Week activities in May.
2.	Help Lodge and State Association Secretaries compile the Survey of Volunteer, Youth, Charitable and Community Service Programs of the Annual Report for filing at <a href="https://www.elks.org/clms2web">https://www.elks.org/clms2web</a>

**BE ALERT! (Year Round)** for legislation/procedures/issues/information that could affect the Benevolent and Protective Order of Elks of the USA.

**STATE CHAIRS** should attend DDGER Clinics, New Officer Clinics, State, Regional Meetings and Seminars to inform those present why the Government Relations Committee is important to all Lodges and why they should be alert to issues that could affect our Order.



## GOVERNMENT RELATIONS REPORT

**DISTRICT:**

**LODGE:**

**CHAIRMAN:**

**REPORT DATE:**

1. Have you updated your Charity Book records and did all events get entered? did you double check your monthly newsletter to see if all events were included?

2. Did you send any correspondences to your local Government this month? For example: Introduction letters, Birthday cards, congratulation letters regarding their goals, invitations to attend a first respond evening?

3. Have any government officials visited your Lodge and/or events?

4. Have you initiated any government officials?

5. Have you sent copies of your Charity Report to all government officials to keep them updated?



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6. Have you published an article in your newsletter and/or local newspaper(s) informing Lodge members as well as your community of contributions made to local charitable organizations?
7. On an ongoing basis, have you been working with your Exalted Ruler, Secretary and other Lodge Officers on your "Charity Records Booklet"?

*\*This Report is for Lodge Chairmen to complete monthly. After completion it should be forwarded to your District Chairman who will forward to the State Chairman. State Chairmen will forward to their Area Representative. Always copy your DDGER & VP.*

Save

Print

*Elks Care — Elks Share*

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