



District Deputy Clinic
Best Practices
January 17th, 2026



AGENDA

- **Welcome**
- **Best Practices: Budget Preparation and Financial Reconciliation**
- **10 Minute Break**
- **Best Practices: Public Relations Tips & Tools**
- **Best Practices: Committees Function**
- **10 Minute Break**
- **Best Business Practices – Getting Ready for a new year.**
- **District Leaders: 2025-2026 Assignments and Discussion**



BUDGET PLANNING AND PROFIT & LOSS

~Gli VonWinning, PER



AGENDA

- ❖ **Introduction to Financial Business Management**
- ❖ **Why is a Budget Important to your Business?**
- ❖ **What is a Profit & Loss?**
- ❖ **Account Reconciliation & Receipt of the Session**
- ❖ **Importance of Bookkeeping/Accounting systems**
- ❖ **Final tips & takeaways**



INTRODUCTION TO FINANCIAL BUSINESS MANAGEMENT

Key Areas of Financial Business Practices involve the following:

- **Financial Planning by Budgeting**
- **Accounting & Record Keeping**
- **Profit & Loss Report**
- **Other Financial Statements**

PREPARING A BUDGET

This is the process of setting clear financial goals for each fiscal year.

A forecast of income, cash flows, and revenue based on financial history. (What are examples of income/revenue/cash flows?)

- 1. Membership Dues**
- 2. RV Parking / Storage**
- 3. Pool / Gym fees**
- 4. Foodservice**
- 5. Bar**
- 6. Other Rentals (Events, Apartments, land use, foodservice, etc.)**
- 7. Lodge Member Activities (BBQ's, fundraiser events, i.e.,: rummage sale, craft festivals, purple pig race, car shows, etc.)**

We need to understand the allocation of resources and how it will be used.

WHY BUDGET?

- 1. Financial Control & Planning-a budget helps you understand , manage, and track your income and expenses.**
- 2. To ensure you do not overspend and maintain a healthy income flow.**
- 3. A budget helps you anticipate potential financial challenges by setting aside contingency funds and plan for the unexpected. What are examples of "contingency funds?" an unforeseen event or circumstance.**
- 4. A budget allows you to plan for UPGRADES & NEEDED REPAIRS**
- 5. Performance Measurement - the budget serves as a benchmark to compare your actual performance against planned financial targets. Important to understand the BUDGET vs. ACTUAL Reports.**

Budget vs. Actuals: Budget_FY26_P&L - FY26 P&L				
April 2025 - March 2026				
EXAMPLE ONLY	Total			
	Actual	Budget	Over Budget	% of Budget
REVENUE				
30165 Lodge Activities Members			0.00	
3016507 Chili Cook Off		400.00	-400.00	0.00%
3016508 Paint & Sip - Income	900.00	1,000.00	-100.00	90.00%
3016511 Gift Card Purchase	10,365.91	10,000.00	365.91	103.66%
3016512 Golf - Youth Activities Charity	34,448.50		34,448.50	
3016514 Members Activity- Income	753.00		753.00	
3016515 Candle Making - Income	390.00		390.00	
3016516 Bingo- Income	2,026.00		2,026.00	
	\$	\$	\$	
Total 30165 Lodge Activities Members	48,883.41	11,400.00	37,483.41	428.80%
3106508 Rummage Sale	910.00	1,250.00	-340.00	72.80%
3106510 Craft Fair	1,864.00	1,500.00	364.00	124.27%
40100 Liquor Income - Member	91,329.00	102,500.00	-11,171.00	89.10%
4010501 Bottles	11,551.00	13,200.00	-1,649.00	87.51%
4010503 Kegs	28,318.25	28,000.00	318.25	101.14%
5011025 Mid-Term Bus Crawl / Lunch income	1,628.00		1,628.00	
40215 Supplies/Garnish/Coffee/Soda	6,443.57	7,500.00	-1,056.43	85.91%
40220 Snack Bar Purchases	859.27		859.27	
4022001 Snack Bar Purchases		800.00	-800.00	0.00%

Budget vs. Actuals: Budget_FY26_P&L - FY26 P&L				
April 2025 - March 2026				
SAMPLE ONLY	ACTUAL	BUDGET	Over Budget	% of BUDGET
EXPENDITURES				
30035 Initiation Fees	331.28	300.00	31.28	110.43%
30165010 Paint & Sip -Expense	1,138.75	700.00	438.75	162.68%
3020503 Bookkeeping Software & Expenses	11,581.92	17,000.00	-5,418.08	68.13%
30220 Contact Newsletter Expenses	1,139.75	2,000.00	-860.25	56.99%
30235 Convention - National	2,500.00	2,500.00	0.00	100.00%
3024001 Convention - State	6,000.00	6,000.00	0.00	100.00%
3024002 Convention - Mid-Term	5,921.88	6,000.00	-78.12	98.70%
30270 Gallagher General Liability Insurance	86,512.67	102,000.00	-15,487.33	84.82%
30275 WC Insurance	9,190.00	23,000.00	-13,810.00	39.96%
30280 D&O Insurance	1,103.00	1,100.00	3.00	100.27%
30290 Lodge Janitorial Supplies	3,071.79	3,500.00	-428.21	87.77%
30310 Credit Card Fees	12,735.22	18,000.00	-5,264.78	70.75%
30311 Bank & Credit Card Fees	393.26	12,341.00	-11,947.74	3.19%
3032001 Postage	1,797.31	2,500.00	-702.69	71.89%
3032002 Lodge Office Supplies	3,403.66	5,400.00	-1,996.34	63.03%

BUDGET VS. ACTUAL REPORT - WHAT TO LOOK FOR

- ❖ **Review Percentage of budget to Actual. Forecast for the next quarter and adjust as necessary.**
- ❖ **Look for “unbudgeted items” These are unplanned (i.e.,: new member events) or possible mistakes to be aligned within the correct line item.**
- ❖ **Budget changes/corrections to align for the rest of the year.**
- ❖ **When making changes, corrections and alignments, it is IMPORTANT that you stay within the approved Budget.**
- ❖ **What happens when you do not stay within the approved budget?**

WHY DO WE NEED TO EFFECTIVELY REVIEW A BUDGET ?

- ✓ **Estimation - forecast anticipated revenues & costs**
- ✓ **Tracking - monitor financial performance & spending habits**
- ✓ **Control - Set spending limits and identify areas for savings or cuts.**
- ✓ **Goals - reaching financial targets such as:**
 - **A Balanced Budget**
 - **To see that Expenses do not to exceed Income**
 - **Preventing debt accumulation**

KEY ASPECT OF A PROFIT & LOSS REPORT

Also known as an “Income Statement” for a specific period (i.e.: monthly, quarterly, fiscal year, days, weeks etc. Profit & Loss Statement summarizes the following:

- All Revenues (i.e.,: dues, lodge rentals, lodge activities, foodservice, events, charities, bar)
- Costs
- Expenses (includes Payroll)

Why is a Profit & Loss Report important to review?

- To show whether you are at a profit or loss! Simple as that.
- Did you know that the P & L provides the necessary financial data for tax preparation and ensures regulatory compliance?

ACCOUNT RECONCILIATION & RECEIPTS OF SESSION

Account Reconciling (month-end) involves the following:

- **Reviewing and comparing transactions against the bank statements and entering missing data into QuickBooks:**
 - **ACH credit & debits (direct deposits, payroll taxes, transfer of funds)**
 - **bank fees & automatic payments and EFT's / electronic vendor payments**
 - **Interest / POS deposits**

Receipts of the Session is prepared by:

- **Setting date parameter (1st - end of mos)**
- **Transferring all transaction from QuickBooks to Excel and obtain a total of Expenses and Deposits.**
- **This will provide a picture of your lodge financial state.**

Reconciling as a month end process is IMPORTANT and ESSENTIAL to identify inaccuracies and to maintain accurate financial records.

THE SYNERGY OF BOTH BUDGET AND PROFIT & LOSS STATEMENTS

- ❖ **The budget is your plan for where you want to go**
- ❖ **The P & L is the report where you have been**
- ❖ **By integrating budgeting and P & L management, your lodge gain complete financial and clear oversight, moving from reactive money management to proactive strategic leadership.**





FINAL TIPS & TAKEAWAYS

- Important to have a qualified Bookkeeper and staff to understand comprehensive duties and systems such as:
 - QuickBooks
 - Financial Reports
 - Chart of Accounts
 - Reconcilements
 - Accounts Receivables and Payables
 - Point of Sale Systems
 - Payroll
 - UBI – for sales tax reporting
 - CPA requests

Important of staffs/employees to input all income transactions into the Point of Sale Systems accordingly



THANK YOU

Gli M. VonWinning-Barrett

Bookkeeper & Payroll Processor

glivonwinning@aol.com

**LET'S TAKE A
10 MINUTE BREAK**

Elks

California West Central District #1200

DD Clinic - January 17, 2026

PUBLIC RELATIONS

Presenters

Mitch Marinovich, PER, & Kathy Gombas

Publicity vs. Public Relations

Nature of Publicity

Publicity seeks media attention through news stories or specific events, aiming to create immediate public awareness for a subject.

Role of Public Relations

Public relations uses strategic communication to build and protect the long-term image of an organization or individual.

Comparison of Approaches

Both aim to influence public perception, but **publicity** is short-term and event-driven, while **public relations** focuses on long-term relationships.





Public Relations vs Publicity

- Terms are often used interchangeably, but they are distinct concepts in the realm of communications and branding.
- Both play crucial roles in shaping public perception and enhancing visibility, yet they differ significantly in purpose, strategy, and execution.

Definitions

- **Publicity** refers to the act of gaining public attention or media coverage for a person, product, or event.



- **Public Relations** is a strategic communication process focused on building and maintaining a positive relationship between an organization or individual and the public.

Control

A key difference between publicity and public relations lies in the level of control

Publicity

- is largely uncontrolled

Public Relations

- PR professionals craft messages, organize campaigns and manage communication channels to ensure the desired message is conveyed.

Purpose

- **Publicity** is often aimed at generating immediate attention. Commonly used to promote new products, events or announcements.
- **Public Relations** takes a broader and long-term approach. Its goal is to cultivate trust, loyalty and a positive image over time.



Scope

Publicity

- is a subset of public relations
- it focuses primarily on media coverage and public exposure

Public Relations

- encompasses a wider range of activities
- generates publicity but also involves internal communication, community engagement and brand positioning



How do you Measure Success?

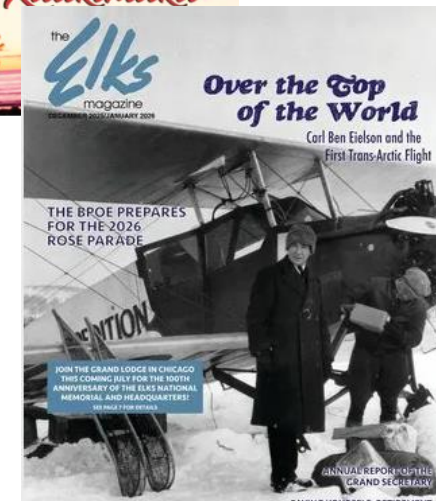
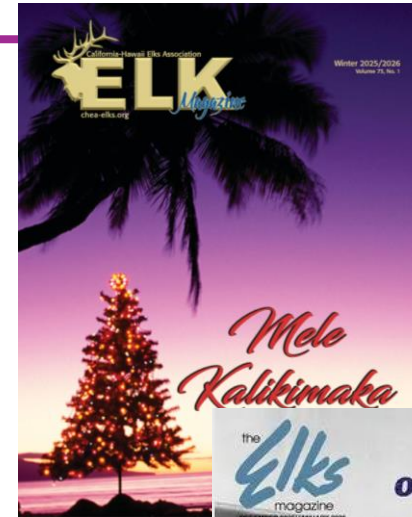
- **Publicity** success is measured by quantity and quality of media coverage
- **Public Relations** success is gauged by qualitative factors, e.g., improved reputation, member trust, member loyalty and long-term relationships



Material Appropriate for The Elks Magazine

- Lodge News and Activities

- ❖ Youth Programs
- ❖ Donations to Local or National Charities
- ❖ Veterans Service Activities
- ❖ State Major Projects
- ❖ Drug Awareness Programs
- ❖ Visits of the GER
- ❖ Elks National Foundation Activities



Material Appropriate for The Elks Magazine - Lodge News and Activities - Continued

- ❖ Charitable Fund-Raising Activities
- ❖ Assistance to People in Distress
- ❖ Obituaries of Past District Deputies and Other Grand Lodge Officers
- ❖ Lodge Centennial Celebrations
- ❖ Institution of New Lodges
- ❖ Dedication of New Lodge Homes



Material The Elks Magazine **Can't** Publish But Your Local Media Can

- ❖ Awards to Elks (e.g., Elk of the Year and recognition given to Lodges and state associations)
- ❖ Lodge Officer Installations
- ❖ Visits of Grand Lodge or State Association Officers other than the Grand Exalted Ruler
- ❖ Initiation Classes or Relative Initiations
- ❖ Old-Timer Recognition Programs
- ❖ Lodge Anniversaries other than Centennials
- ❖ Mortgage Burnings and Ground Breaking for New Lodge Buildings
- ❖ Advertising for Fund-Raising Activities
- ❖ Social, Public Relations, and Other Noncharitable Events



Continued - Material The Elks Magazine **Can't** Publish But Your Local Media Can

- ❖ Non-Elks Activities
- ❖ Highway and Park Cleanups
- ❖ Proclamations and Entries into Parades
- ❖ Youth Town-Takeovers
- ❖ Publicity for Future Events
- ❖ Poems, Eulogies, Editorials, and Humor
- ❖ Mandatory Events, e.g., Flag Day Observance, Elks Memorial Service
- ❖ Elks Hoop Shoot (which is covered at the national level in the magazine)



Photo Considerations



1. Photos should always feature people
2. Photos should show at least one person but no more than ten
 - *Better chance of publication with 2-4 people (per Ted Olsen)*
3. All individuals pictured must be identified from left to right, row-by-row fashion (with full names and titles, if appropriate)
 - *EXCEPTION: Do not list last names of minors in your articles or in photo captions (CHEA policy)*
4. Photos must depict charitable events and must always show at least one of the individuals being served by the lodge's activity (for example, a charitable recipient, a veteran, or a student)

Photo Considerations - continued



5. Photos that show the US flag must reflect proper flag etiquette
6. Photos should not depict bank checks, facsimiles of checks, gift certificates, or savings bonds (*NOTE: CHEA editor may consider allowing photos of checks – case by case basis*)
7. Photos should never show the presence of alcohol or cigarettes
8. Permission to photograph individuals must be obtained by the local Lodge.
 - It is not required that these forms be shared with The Elks Magazine; however, keep these forms on file.
 - If a photograph is taken by a third party, it is the responsibility of the Lodge to secure the rights to the image before sharing it with the magazine

Requirements for Digital Photographs



- It is important to create, save, and send digital images in high resolution.
- Digital photos must have a minimum resolution of 1,500 by 900 pixels to be reproduced with acceptable quality.
 - The higher the resolution, the better
- Set your digital camera so it takes the highest resolution images possible.
- When sending digital photos, many phones and email programs will allow you to designate a photo size.
 - Select the largest possible size to ensure that the photo is received at the highest resolution



What can be done at your Lodge

- Lodge Public Relations Chairperson
 - Take Pictures (Lots) - Magazines will accept hi-res digital photos only.
- Event Chairperson can either draft or work with the Lodge PR Chair to write the article for your lodge newsletter, State and National Magazines, Local newspaper.
 - ❖ Remember the Who, What and Why when writing the article.
- All events and activities within your Lodge is noteworthy.
 - ❖ Think 90/10 = 90% of the work is done by 10% of the members.
 - ❖ What better way to increase members to volunteer to participate and become involved. Members like to go through the magazines to see their Lodge mentioned.

Where and When to Submit Your Lodge Articles

CHEA Magazine

- Ted Olsen
- Email editor@cheamag.org



Elks National Magazine

- Tom Scudder
- Email magnews@elks.org



Submission and Copy Deadlines

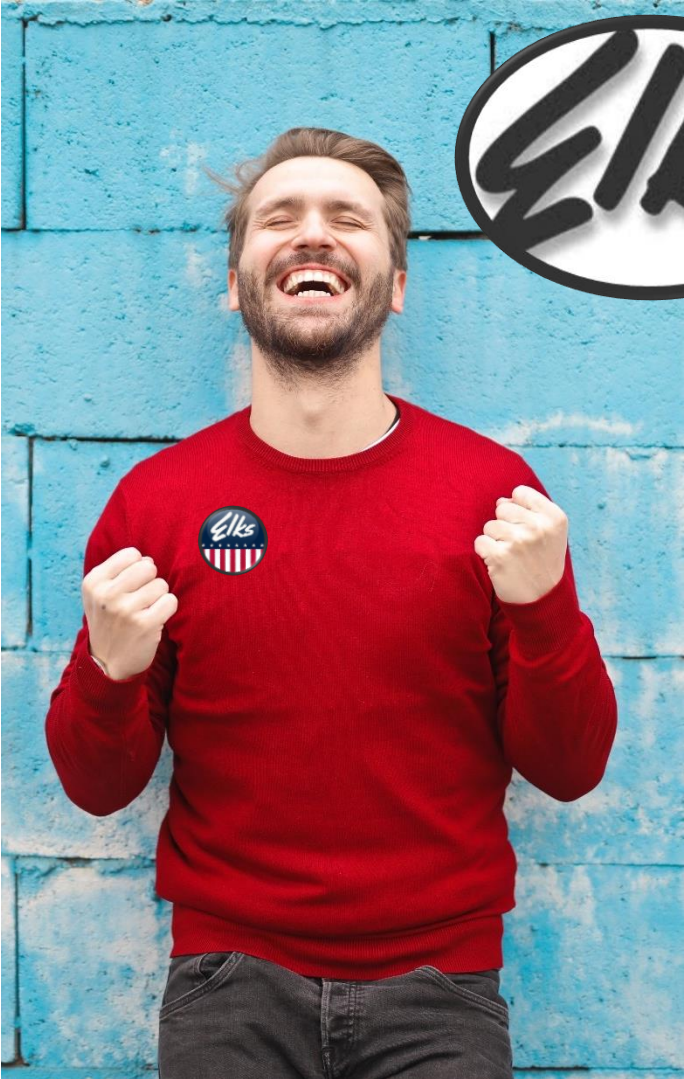
Due the first day of February, April, June, August, & November

Editorial Guidelines:



Submission and Copy Deadlines

Anytime!



California West Central District

We have **GREAT NEWS**

If we tell it, if we share it

How....

HOW

Media Platforms

- Emails/Texts
- Websites
- Social Media
- Magazines



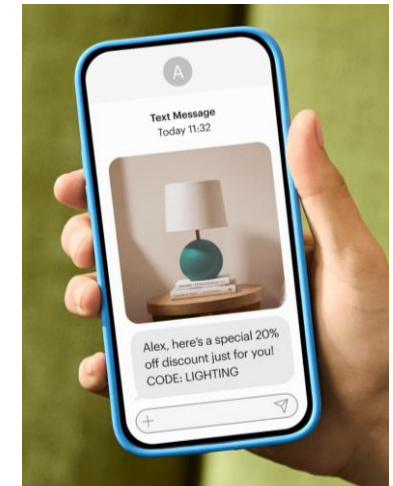
I'm going to explore

Email / Text Platforms



Automated email distribution systems

- Email Lodge news bulletins to select audience(s)
 - Members, DLs, WCD Lodge Secretaries
 - Must receive members permission to receive email / text, e.g., at orientation
- Recipients can unsubscribe at any time
- Provide metrics reports
- **NEW OPTION:** Short Messaging System
 - SMS (automated texts)



TEXT event reminders


EXAMPLE:

Download email addresses and mobile numbers from CLMS monthly
and upload into Mailchimp


I'm going to advocate members receive

Emails vs. Post

Ask members to opt-in to receiving news bulletins via email vs. post (Post a “fillable” subscription form on your website)



Monterey Elks Lodge 1285
Instituted July 9, 1913



Find us on
Facebook

HomeOur Lodge ▾News & Events ▾Elks ▾RV ParkContacts ▾

Newsletter Subscription

Please fill in the form below to receive the Lodge Monthly Newsletter by Email.

Your Member Number

Your name

Your email

Additional Info (optional)

Submit

Form is submitted to
Lodge Secretary email

I'm going to keep up-to-date

Websites – Elks.org

The screenshot shows the Elks.org website homepage. At the top is a dark blue header with the Elks USA logo on the left, the text "The Benevolent and Protective Order of Elks of the United States of America" in the center, and a red button that says "Join the ELKS!" on the right. Below the header is a red navigation bar with links: ELKS HOME, WHO WE ARE, OUR PROGRAMS, ELKS NATIONAL FOUNDATION, and MEMBERS ONLY. A search bar is on the right of the navigation bar. The main content area features a large banner for "RV Facilities" with a background image of a motorhome on a road and the text "Search for Lodge hookups!". Below the banner are two columns. The left column is titled "Who Are the Elks?" and includes a circular logo with a deer head and the text "Elks Lodges bring so much more to their communities than just a building, golf course or pool. They are places where neighbors come together, families share meals, and children grow up." Below this is a link "Learn more about the Elks". The right column is titled "Lodge Locator" and includes the text "Enter your zip code to find the Elks lodge closest to you." followed by a zip code input field and a "Find" button. Below the locator is a section for "West Virginia Elks Association" with a photo of a group of people and a link "Click here for more info". At the bottom of the page is a banner for the "Elks Disaster Relief Fund" with a "Donate today!" button.

Who Are the Elks?

Elks Lodges bring so much more to their communities than just a building, golf course or pool. They are places where neighbors come together, families share meals, and children grow up.

[Learn more about the Elks](#)

Lodge Locator

Enter your zip code to find the Elks lodge closest to you.

[Find](#)

West Virginia Elks Association

[Click here for more info](#)

Elks Disaster Relief Fund

[Donate today!](#)

Lodge #1285 Home ▾

Welcome

News

Calendar

Facilities

RV Parking

Officers & Chairs

Resources

Can refer viewers to
your Lodge website

I'm going to keep up-to-date and monitor metrics

Websites – Lodge Website



Welcome to Monterey Elks Lodge No. 1285

Newsletters

- Read our [January 2026](#) Newsletter.
- To receive our newsletter by email, [signup here](#)

Hours of Operation

- Facility Hours – [View the Hours](#)
- Bar Hours – [View the Hours](#)

Banquet Hall Rental

The Monterey Elks Lodge is a wonderful choice for your next event. The Lodge features a newly renovated full bar, commercial kitchen, grand dining room, bar/lounge, elevated stage, dance floor, and free guest parking. [Rental Information](#)

Upcoming Events

RSVP to Dinners & Events by calling 831-373-1285

- [January Events Calendar](#)
- Sundays starts at Noon – [Potluck BBQ](#)
- Mondays- 4:30pm – [Taco Night](#)
- Every Third Tuesday – 4:30pm – [Bingo Night](#)
- Wed Dinners – 6pm – [View our January Menus](#)
- Thu & Fri Lunches – 11:30am-2:30pm – [View the Menu](#)
- Thursdays – 4:30pm – [Soup & Sandwiches](#)
- Every Other Friday – 6-11pm – [Karaoke Night](#)
- Feb 21st – 6:30 pm – [Crab Fest](#)

Elks Scholarships

- [Vocational Grant](#)
- [Legacy Award](#) – Application deadline Feb 2, 2026
- [Undergraduate Scholarship Program for Students with Disabilities](#) –



Membership

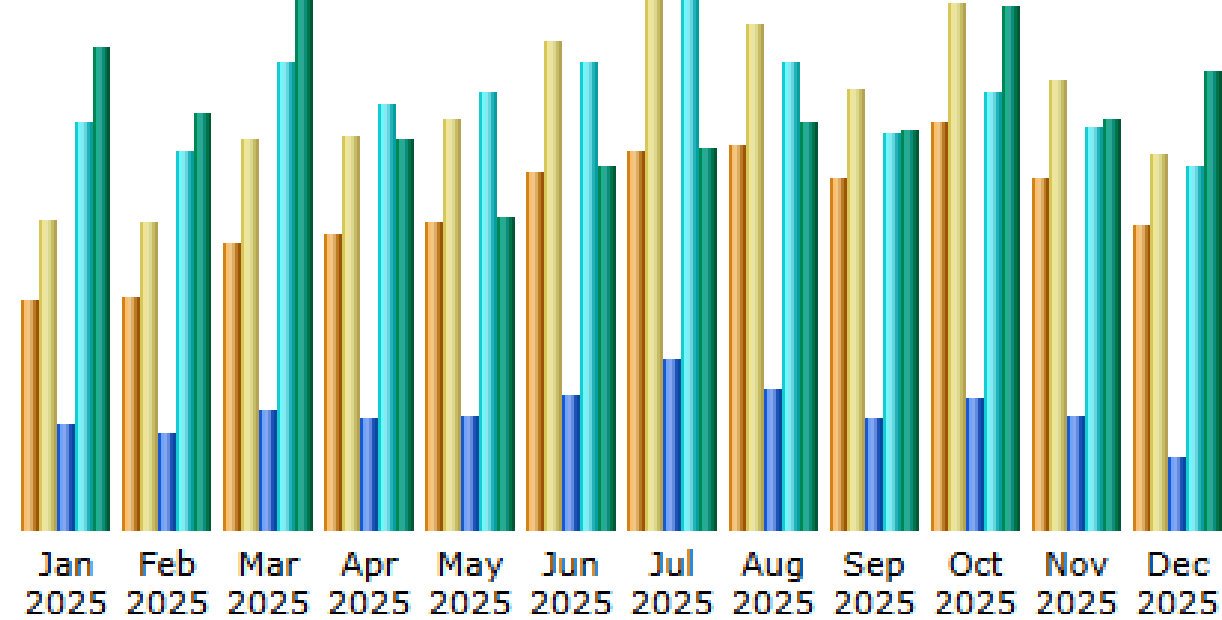


Interested in becoming a member of our lodge? [Learn more...](#)

[Contact us](#) or [download a membership application](#). Do you know somebody who you think would be a great new member? [Invite them here](#) and they will receive an email to complete their application.

Website Metrics











Lodges to report number of monthly visits/hits to District PR Chair



Month	Unique visitors	Number of visits	Pages	Hits	Bandwidth
Jan 2025	1,372	1,843	9,143	35,266	365.75 MB
Feb 2025	1,378	1,826	8,278	32,898	316.88 MB
Mar 2025	1,700	2,314	10,491	40,415	404.58 MB
Apr 2025	1,752	2,342	9,638	36,992	294.66 MB
May 2025	1,821	2,443	9,911	38,081	237.71 MB
Jun 2025	2,133	2,912	11,667	40,433	275.68 MB
Jul 2025	2,259	3,179	14,775	46,324	289.24 MB
Aug 2025	2,293	3,010	12,119	40,615	308.64 MB
Sep 2025	2,100	2,616	9,593	34,258	303.35 MB
Oct 2025	2,427	3,135	11,570	37,980	396.81 MB
Nov 2025	2,087	2,684	9,787	34,943	311.11 MB
Dec 2025	1,810	2,236	6,276	31,636	346.47 MB
Total	23,132	30,540	123,248	449,841	3.76 GB

Website Metrics

Top 10 Downloads from Website

Downloads (Top 10) - Full list	
Downloads: 17	
	/wp-content/uploads/2021/10/elks_application.pdf
	/wp-content/uploads/2025/03/Monterey-Elks-Rental-Brochure-K-Gomb...
	/wp-content/uploads/2025/12/December-Calendar-1.pdf
	/wp-content/uploads/2025/12/LUNCH-MENU-SPECIAL.pdf
	/wp-content/uploads/2025/10/Sunday-BBQ.pdf
	/wp-content/uploads/2025/12/Gift-Drive.pdf
	/wp-content/uploads/2025/10/October-Menu.pdf
	/wp-content/uploads/2025/03/April-2025-Dinner-Menus.pdf
	/wp-content/uploads/2025/12/Paint-Sip-12-5.pdf
	/wp-content/uploads/2025/03/April-Calendar.pdf

I'm going to use

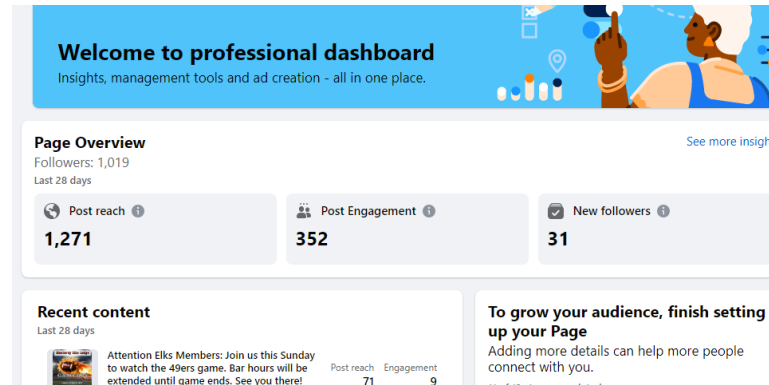
Social Media



- Post Scholarships, ENF, Vets Info too
- Tag @California-Hawaii Elks Association on your posts & CHEA will re-post



- Use the Professional Dashboards for metrics



- Don't ignore bad reviews, e.g., Yelp negative comments – respond positively

I'm going to create & use

QR Codes




MAKE GIVING EASY & JOIN THE CLUB!

Enroll today and become a member of the Fidelity Club - the ENF's monthly giving program.


- Give automatic, regularly scheduled donations through your bank account or credit card. These donations occur monthly (minimum \$5)
- Increase, modify or cancel your gift at anytime online
- Sign up by scanning the QR code and make a sustaining difference in the Elks communities today



Monterey Elks RV Park



Reserve online



Amenities:

- Free Wi-Fi
- Showers
- Pool, gym, sauna
- Coin-operated washer/dryer

Member Rates

- 10 sites with water & electric hook ups - \$60/night
- 4 dry camping spots - \$35/night

**For more info call RV Host (831) 275-8390
or email rv@elks1285.com**

There are several QR Code Generators available

I'm going to publish in

Elks Magazines



And, I'm going to use

Elks Shareables
to promote **ELKdom!**



Scan Me for Elks Shareables





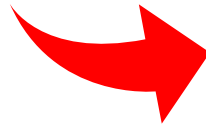
- Publicity is **NOT FREE** if you want to be effective
- Public relations is a strategic endeavor that requires a dedicated budget

Public Relations Budget (Example only)

Software / Platforms	Annual
Website Domain , e.g. Blue Host	\$25
Website Hosting Platform , e.g. WordPress	\$240
Email Marketing Platform , e.g. <i>Mailchimp Essential Plan</i>	\$320 +\$80 for SMS
QR Code Creator , e.g. QR-Code.io	\$240
Adobe PDF Editor (to edit / compress files; convert PDF to Word; create fillable forms)	\$240
Flyer software , e.g. PosterMyWall (Premium)	\$100
Local Newspaper/Radio fees , e.g., <i>Open to Public Events, Membership Drives</i>	\$200

Lodge Event Collaboration

- **Gilroy Lodge Soccer Shoot**
 - Rich Torres, Watsonville, and Paul Bucini, Sunnyvale, assisted
- **Project Hero**
 - Santa Cruz and Gilroy Lodges



Santa Cruz Elks Lodge #824
150 Jewell Street, Santa Cruz


PROJECT HERO

California Challenge Bike Ride

SUNDAY, OCTOBER 19TH 6 PM
Kick-off Dinner for the 400-mile California Challenge Bike Ride



Santa Cruz and Gilroy Lodges come together to present their Lodge donation from the ENF Freedom Grant to Project Hero, a non-profit organization dedicated to help veterans and first responders affected by PTSD and TBI (traumatic brain injury) achieve rehabilitation, recovery, and resilience.



PROJECT HERO
Hope Recovery Resilience

**OCT 19
SANTA CRUZ (REGISTRATION DAY)**

**OCT 20
SANTA CRUZ TO CARMEL**

**OCT 21
CARMEL TO SAN SIMEON**

**OCT 22
SAN SIMEON TO PISMO BEACH**

**OCT 23
PISMO BEACH TO SOLVANG**

**OCT 24
SOLVANG TO VENTURA**

**OCT 25
VENTURA TO PORT HUENEME**

In Conclusion

- Publicity and public relations share the goal of enhancing visibility, they operate on different levels.
- Publicity is immediate, often unpredictable and focuses on grabbing attention.
- Public Relations is deliberate, controlled and aims to build long term relationships.
- The WCD Elks Lodges will benefit most by strategically integrating both, leveraging the spontaneity of publicity and the structured approach to PR to achieve their communications goal



Looking forward to our WCD Lodges accomplishing great things

Thank You
Any
Questions
Please
Ask





Choosing the Right People

for the right job!

Provide them resources that to make them
successful

How do you find them?

- ❖ Attend Orientation and meet the new members -
- ❖ Leading Knights – get involved or conduct the Orientation – this is a pool of people you can draw from during your year.
- ❖ ASK!! – if you don't ask, you won't know!

Committee Chairpersons



Make sure that when a committee chairpersons name is submitted , that they have accepted it and are not surprised.



Make sure they are aware of their responsibilities and reporting required. Who is responsible if reporting is not completed? ER



When possible , if the committee chair is new have a mentor or a past committee chair assist them



Have Committee Chairpersons complete a playbook that can be passed on the next year

Lodge Activities Calendar

Start now for next year!!!!

WHY??????

Budgeting

Finding
Chairmen

Blocking dates
for fraternal
events

Planning and
advertising

Lodge Activities Calendar

IMPORTANT DATES TO AVOID WHEN SCHEDULING LODGE OR PERSONAL EVENTS

Installation of officers

State Convention

VP Visits

DD Visits

State Pres Visit

Mid Term

DD Clinics

- March 14-April 15th
- May 15-16
- May-July (multiple – add to calendar)
- August – October (multiple – add to calendar)
- November
- 1st full weekend in November.
- Add to calendar once announced

Committee Reporting

Provide Chairpersons the report due dates and District Chairman Information

Post report due dates for committees with the District Chairman information

Set reminders to send out to Chairpersons

Work with Chairpersons on first report

Assign a PER or past chairperson as a mentor

10 Minute Break



Better Business Practices

DD Clinic
January
17th, 2026

Purpose and Intro

The purpose of this presentation is to provide Best Practices to manage the operations of your lodge efficiently and successfully.

- ▶ This presentation is intended to be interactive and Spur discussion on Best Practices

Please do not hesitate to share any best practices that you have found helpful to your lodge!

First and Foremost :

Exalted Rulers should assign A Business Practices Chairperson

- ▶ Adding this to your Lodge's Auditing and Accounting Committee will ensure that your Lodge is using proper business practices and provide the Exalted Ruler with recommendations for improvement of any processes and procedures

Best Business Practices

Internal controls

Each Lodge should have a system of internal controls to protect its assets and these should be documented in a lodge manual.

Voucher systems and Authorizations

- ▶ vouchers for payment of bills.
- ▶ authorizing payment of employees.
- ▶ Procedures for receipt of merchandise and supplies.



Internal controls

Inventories:

- ▶ Bar manager or bar employees should never be involved with Bar inventory or receiving.
- ▶ Kitchen manager or staff should not be involved with Kitchen Inventory
- ▶ Trustees are responsible for Asset control -
Inventory of all assets are required annually
 -
 - ▶ Trustees can assign this to others to assist
 - ▶ Exalted Ruler can create a Committee with the approval of the Trustees
 - ▶ Lodge assets should be covered by insurance adequately

Internal controls

Office Best Practices and separation of duties:

- ▶ Person receiving cash should not
 - make deposits (secretary)
 - reconcile RV/Bar/Restaurant receipts
- ▶ Secretary's receipts should be reconciled with the Treasurer's receipts at least monthly.
- ▶ Persons handling cash should be properly bonded
- ▶ Cash kept in lodge overnight locked in an approved safe.
- ▶ Access to Safe should be limited

- ▶ Exalted Rulers -
 - ▶ Have an officer meeting prior to April 1st -
 - ▶ Provide your Officers with the Officer Manual
 - ▶ Read Roberts Rules - understand that it picks up when Statutes do not address
 - ▶ Complete Officer Training early in April
 - ▶ Meet with the committee chairman - provide what they will need for reporting
 - ▶ Set reminders for report due dates

Fraternal Best Practices

Share Best Practices Time Permitting

Questions



District Leaders Announcements



THANK YOU

California West Central District

FOR ATTENDING