

# District Deputy Clinic Best Practices

## January 17<sup>th</sup>, 2026





# AGENDA

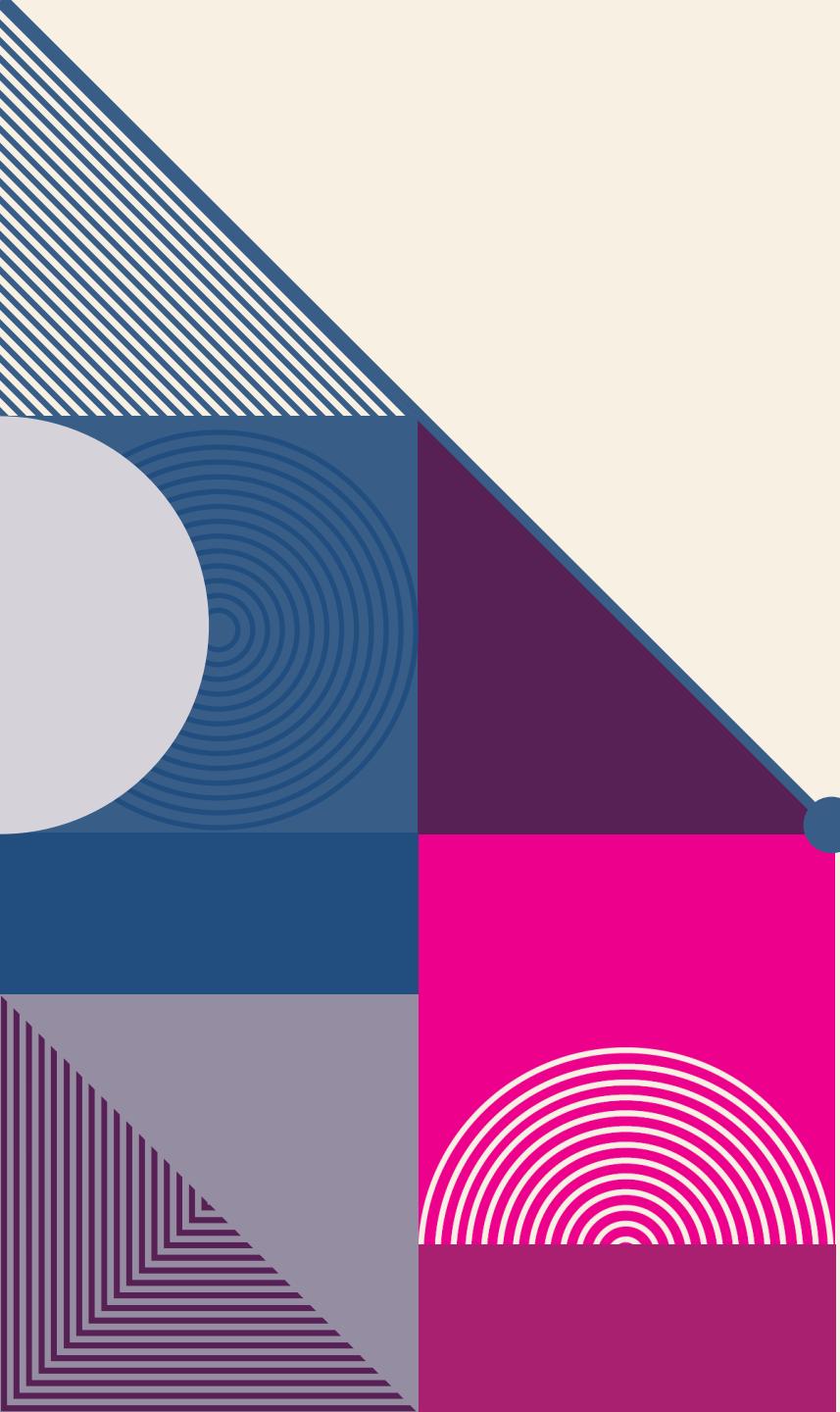
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- **Welcome**
- **Best Practices: Budget Preparation and Financial Reconciliation**
- **10 Minute Break**
- **Best Practices: Public Relations Tips & Tools**
- **Best Practices: Committees Function**
- **10 Minute Break**
- **Best Business Practices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



# BUDGET PLANNING AND PROFIT & LOSS

*~Gli Von Winning, 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

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**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?

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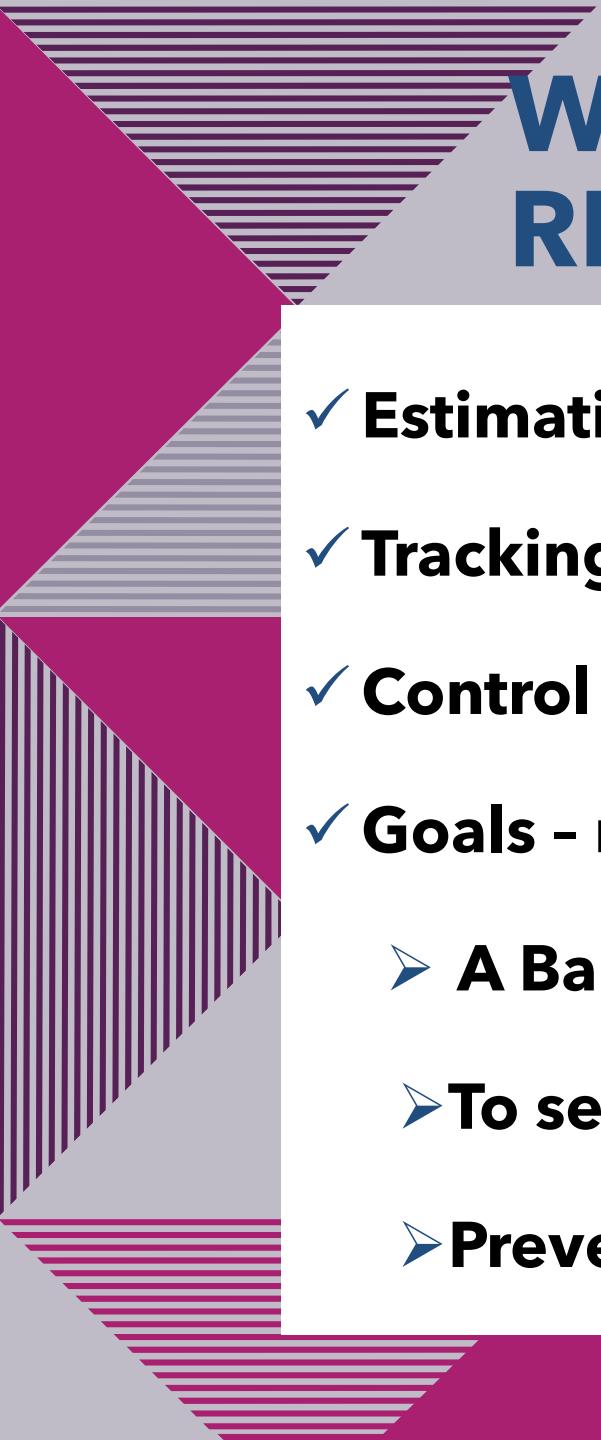
- 1. Financial Control & Planning-a budget helps you understand , manage, and track your income and expenses.**
- 2. To ensure you do not overspend and maintain a healthy income flow.**
- 3. A budget helps you anticipate potential financial challenges by setting aside contingency funds and plan for the 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
<b>REVENUE</b>				
<b>30165 Lodge Activities Members</b>			<b>0.00</b>	
<b>3016507 Chili Cook Off</b>		<b>400.00</b>	<b>-400.00</b>	<b>0.00%</b>
<b>3016508 Paint &amp; Sip - Income</b>	<b>900.00</b>	<b>1,000.00</b>	<b>-100.00</b>	<b>90.00%</b>
<b>3016511 Gift Card Purchase</b>	<b>10,365.91</b>	<b>10,000.00</b>	<b>365.91</b>	<b>103.66%</b>
<b>3016512 Golf - Youth Activities Charity</b>	<b>34,448.50</b>		<b>34,448.50</b>	
<b>3016514 Members Activity- Income</b>	<b>753.00</b>		<b>753.00</b>	
<b>3016515 Candle Making - Income</b>	<b>390.00</b>		<b>390.00</b>	
<b>3016516 Bingo- Income</b>	<b>2,026.00</b>		<b>2,026.00</b>	
<b>Total 30165 Lodge Activities Members</b>	<b>\$ 48,883.41</b>	<b>\$ 11,400.00</b>	<b>\$ 37,483.41</b>	<b>428.80%</b>
<b>3106508 Rummage Sale</b>	<b>910.00</b>	<b>1,250.00</b>	<b>-340.00</b>	<b>72.80%</b>
<b>3106510 Craft Fair</b>	<b>1,864.00</b>	<b>1,500.00</b>	<b>364.00</b>	<b>124.27%</b>
<b>40100 Liquor Income - Member</b>	<b>91,329.00</b>	<b>102,500.00</b>	<b>-11,171.00</b>	<b>89.10%</b>
<b>4010501 Bottles</b>	<b>11,551.00</b>	<b>13,200.00</b>	<b>-1,649.00</b>	<b>87.51%</b>
<b>4010503 Kegs</b>	<b>28,318.25</b>	<b>28,000.00</b>	<b>318.25</b>	<b>101.14%</b>
<b>5011025 Mid-Term Bus Crawl / Lunch income</b>	<b>1,628.00</b>		<b>1,628.00</b>	
<b>40215 Supplies/Garnish/Coffee/Soda</b>	<b>6,443.57</b>	<b>7,500.00</b>	<b>-1,056.43</b>	<b>85.91%</b>
<b>40220 Snack Bar Purchases</b>	<b>859.27</b>		<b>859.27</b>	
<b>4022001 Snack Bar Purchases</b>		<b>800.00</b>	<b>-800.00</b>	<b>0.00%</b>

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

# 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 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:

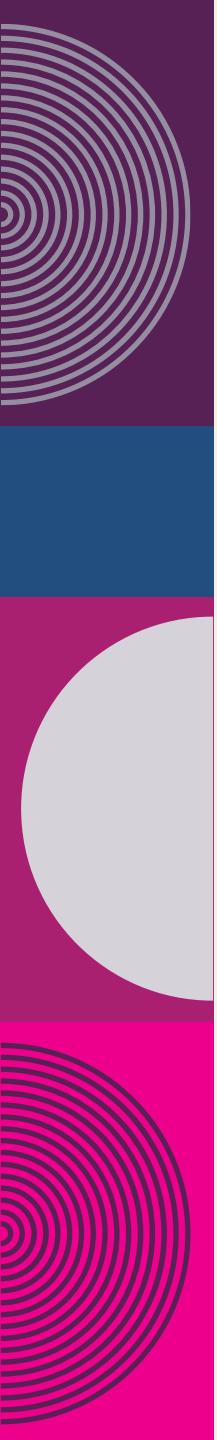
- **Setting date parameter (1<sup>st</sup> - end of mos)**
- **Transferring all transaction from QuickBooks to Excel and obtain a total of Expenses and Deposits.**
- **This will provide a picture of your lodge financial state.**

**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

[givonwinning@aol.com](mailto:givonwinning@aol.com)

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



California West Central District #1200

DD Clinic - January 17, 2026

# PUBLIC RELATIONS

Presenters

Mitch Marinovich, PER, & Kathy Gombas

# Publicity vs. Public Relations

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## 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

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- 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

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- **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

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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

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- **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?

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- **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

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- ❖ 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

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- ❖ 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

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- ❖ 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

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- 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](mailto:editor@cheamag.org)



## Elks National Magazine

- Tom Scudder
- Email [magnews@elks.org](mailto:magnews@elks.org)



### Submission and Copy Deadlines

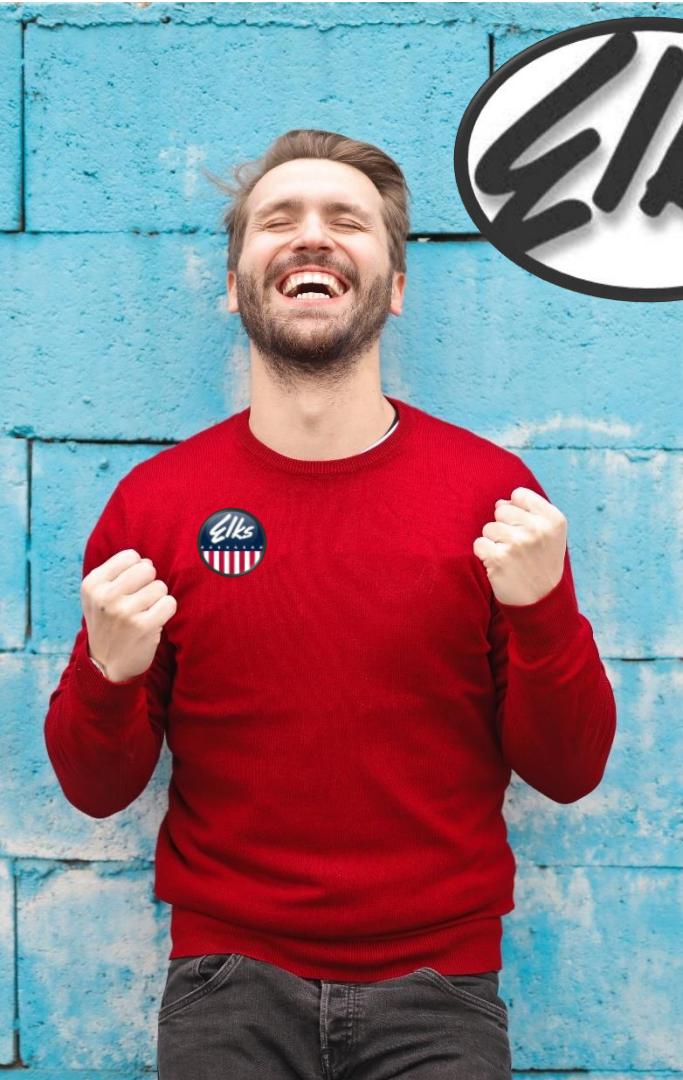
Due the first day of February, April, June, August, & November

#### Editorial Guidelines:



### Submission and Copy Deadlines

Anytime!



California West Central District

*We have*  
**GREAT NEWS**

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If we tell it, if we share it

How....

# HOW

## Media Platforms

- Emails/Texts
- Websites
- Social Media
- Magazines



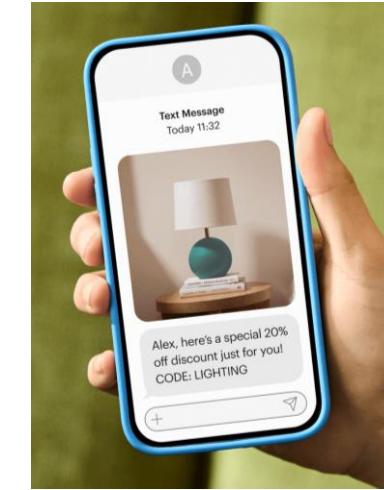
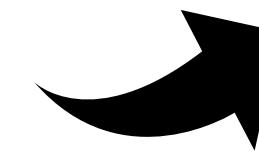
I'm going to explore

# 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

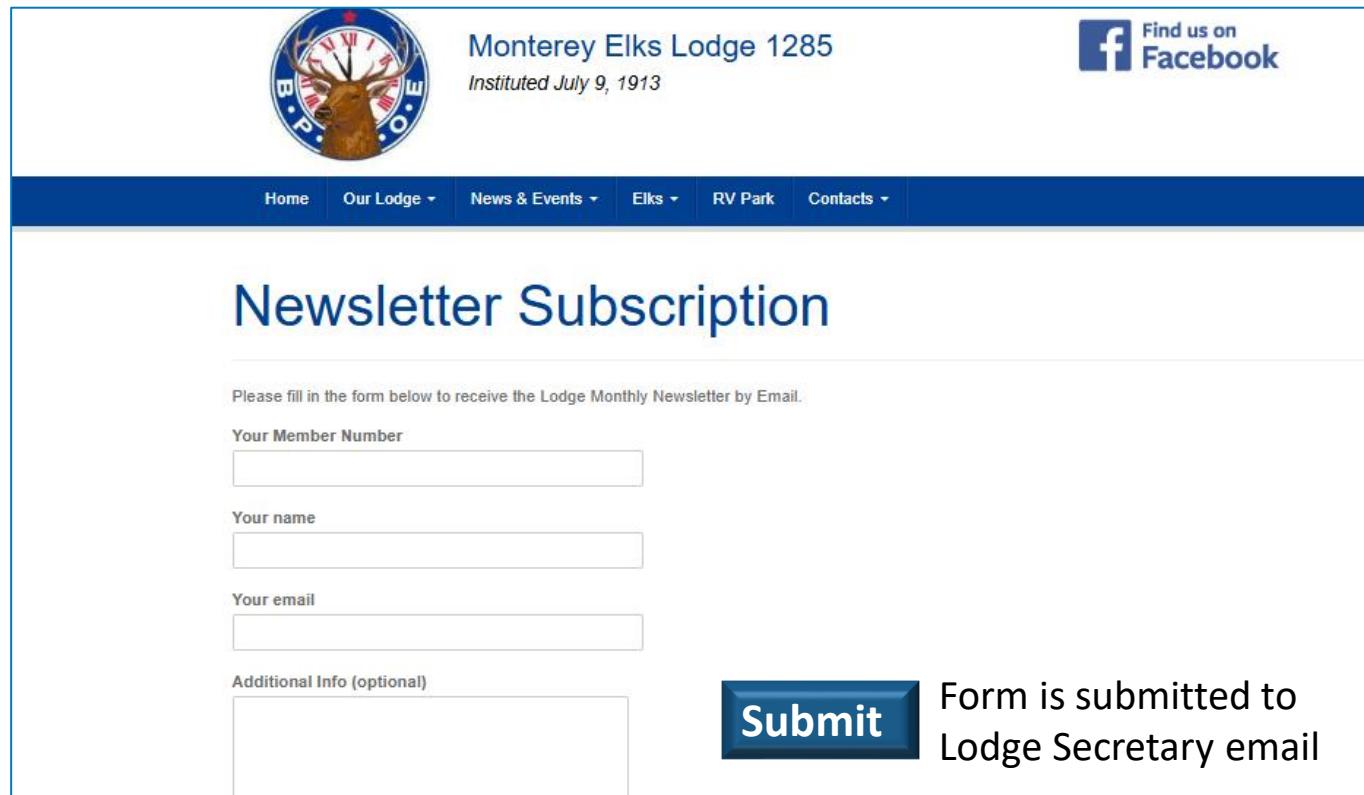
### EXAMPLE:

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)**



The image shows a screenshot of the Monterey Elks Lodge 1285 website. At the top, there is a logo of a elk with a clock face on its body, followed by the text "Monterey Elks Lodge 1285" and "Instituted July 9, 1913". To the right is a "Find us on Facebook" button. A blue navigation bar below the header contains links for "Home", "Our Lodge", "News & Events", "Elks", "RV Park", and "Contacts". The main content area is titled "Newsletter Subscription" in blue text. It includes a sub-instruction "Please fill in the form below to receive the Lodge Monthly Newsletter by Email." followed by four input fields: "Your Member Number", "Your name", "Your email", and "Additional Info (optional)". To the right of these fields is a blue "Submit" button. To the right of the "Submit" button, the text "Form is submitted to Lodge Secretary email" is displayed.

Monterey Elks Lodge 1285  
Instituted July 9, 1913

Home Our Lodge News & Events Elks RV Park Contacts

## 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 homepage of Elks.org features a large banner at the top with the text "I'm going to keep up-to-date Websites – Elks.org". Below this is the official logo of The Benevolent and Protective Order of Elks of the United States of America, featuring a stylized elk head and the words "Elks usa". The main navigation menu includes links for "ELKS HOME", "WHO WE ARE", "OUR PROGRAMS", "ELKS NATIONAL FOUNDATION", and "MEMBERS ONLY". A search bar and a "Join the ELKS!" button are also present. The main content area features a large image of an RV parked on a road with mountains in the background, with the text "Elks RV Facilities" and "Search for Lodge hookups!". Below this are sections for "Who Are the Elks?", "Lodge Locator", and "Elks Disaster Relief Fund". The "Who Are the Elks?" section includes a circular logo with an elk 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." A "Learn more about the Elks" link is also provided. The "Lodge Locator" section has a form to enter a zip code and a "Find" button. The "Elks Disaster Relief Fund" section features a photo of people in a boat on a river and a "Donate today!" button.

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

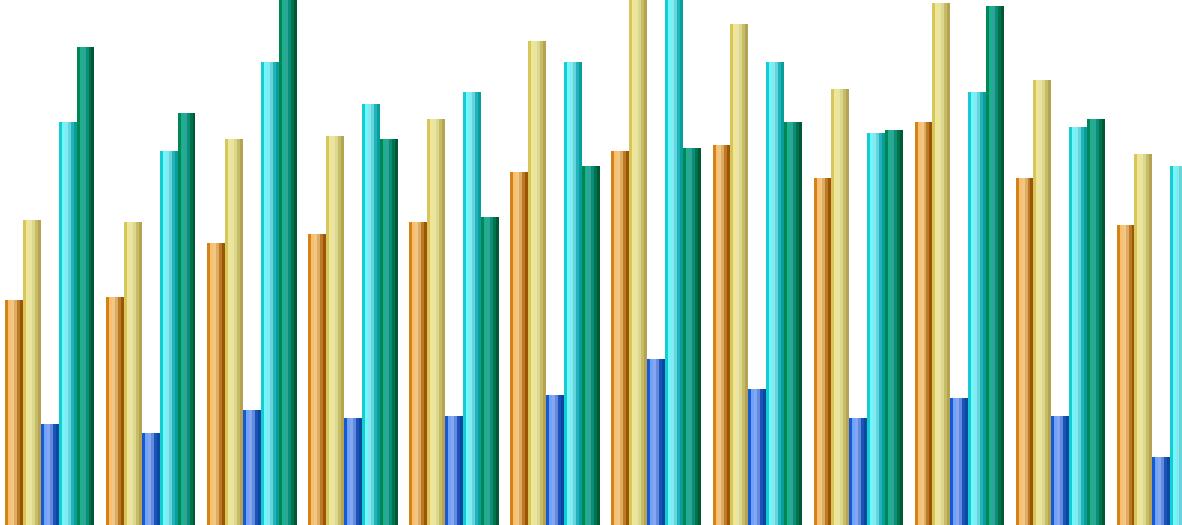


Interested in becoming a member of our lodge? [Learn more...](#)

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



Jan 2025 Feb 2025 Mar 2025 Apr 2025 May 2025 Jun 2025 Jul 2025 Aug 2025 Sep 2025 Oct 2025 Nov 2025 Dec 2025

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

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

Welcome to professional dashboard

Page Overview

Followers: 1,019

Last 28 days

Post reach: 1,271

Post Engagement: 352

New followers: 31

Recent content

Attention Elks Members: Join us this Sunday to watch the 49ers game. Bar hours will be extended until game ends. See you there!

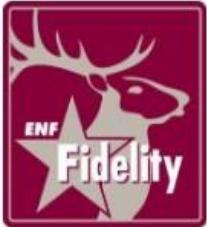
To grow your audience, finish setting up your Page



- 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



### Amenities:

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

[Reserve online](#)



### 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](mailto: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



Community • Friendship • Charity  
[join.elks.org](http://join.elks.org)





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

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**

**PROJECT HERO**  
Hope Recovery Resilience

## In Conclusion

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- 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

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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!!!!

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## 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

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

State Convention

VP Visits

DD Visits

State Pres Visit

Mid Term

DD Clinics

# Committee Reporting

Provide Chairpersons the report due dates and District Chairman Information

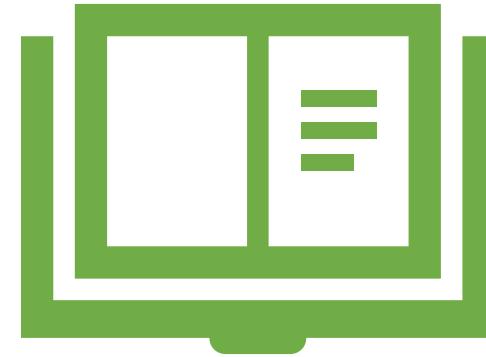
Post report due dates for committees with the District Chairman information

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**

A photograph of a silver electronic calculator with a digital display and a numeric keypad, resting on a green leather notebook with a matching green pencil. The calculator has various function keys like INS, DEL, and CA. The notebook is bound with a green elastic band. The background is a dark, textured wooden surface.

# 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

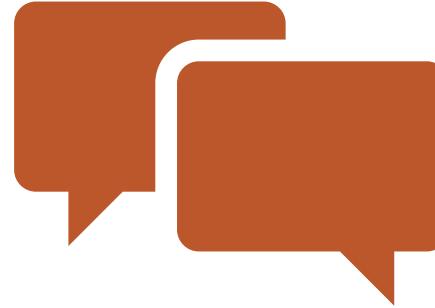
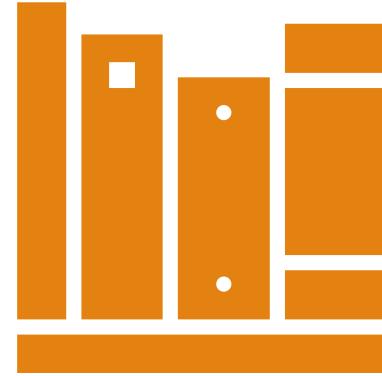
- ▶ Exalted Rulers -
  - ▶ Have an officer meeting prior to April 1<sup>st</sup> -
    - ▶ Provide your Officers with the Officer Manual
  - ▶ Read Roberts Rules - understand that it picks up when Statutes do not address
  - ▶ Complete Officer Training early in April
  - ▶ Meet with the committee chairman - 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

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**THANK YOU**

California West Central District

**FOR ATTENDING**