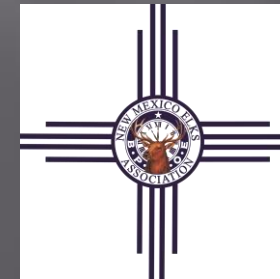


MANAGEMENT AND TEAMWORK

New Mexico Elks Association
Training Committee



Introduction

This module will explain basic terminology and structures in the Lodge, State, and Grand Lodge hierarchy. It also introduces teamwork and basic management concepts that are important to understand if you, as an Officer Team, are to successfully manage and operate your Lodge. You may find some of these concepts familiar from your job, as there are many similarities. After all, your Lodge is a non-profit corporation, and is subject to the same managerial situations you will find at work.

But first, a gentle reminder.....

Excuse #1: “We are volunteers”

- ▣ True for General membership
- ▣ Officers (and committee chairs!) take a step up
 - Swear before the altar to “Do their job to the best of their ability”
- ▣ Holding an Office is a significant responsibility
 - You represent your Lodge
 - You represent the National Elks Organization
 - You are part of the management of a charitable organization
 - This takes time and effort!

Grand Lodge vs. State Association

Much confusion – why are there two bodies?

Grand Lodge:

- ▣ Responsible for all statutory requirements
- ▣ Has full judicial authority
 - Can suspend, expel members
 - Can put a Lodge on probation, revoke charter
- ▣ Essentially defines what the BPOE is
- ▣ Your contact is your District Deputy Grand Exalted Ruler

Grand Lodge vs. State Association

State Association:

- ▣ Promotes and implements Grand Lodge programs through the Lodge/District/State committees
- ▣ Manages the state major project, CP
- ▣ Does not have any judicial authority
- ▣ Can levy membership dues
- ▣ Promotes inter-Lodge activities and cooperation

Responsibility and Accountability

Responsibility and *accountability* are two concepts that appear frequently in this presentation. Most people tend to use them interchangeably, but they do have distinct meanings. From a business perspective, you are *responsible* for something if you do it; you are *accountable* for something if you must answer for it. You can be both, of course. These are the definitions used in this presentation. Here's a couple of examples:

Example 1

As Exalted Ruler, you appoint Jane Member to chair the Lodge Membership Committee. That committee is required to submit various reports during the year. As Chair, Jane is responsible for preparing and submitting the reports, while you, as Exalted Ruler, are accountable. If the reports are not completed, the Exalted Ruler will answer for it.

Example 2

Another slightly more complicated example concerns the annual audit. Each Lodge is required to submit the audit report by June 30th. The Audit Committee is responsible for completing the audit, the sitting Exalted Ruler is accountable for getting it completed, and the previous year's Exalted Ruler is accountable for the results of the audit.

The Lodge – Not “The Club”

Your personal reference, and any media reference, should always be to the Lodge, not the Club. We are Order of Elks Lodges, not Elks Clubs.

The Lodge is the supreme authority. It controls all:

- ▣ By Laws
 - Must not conflict with Grand Lodge Statutes.
 - Must be revised at least every five (5) years (GLS Sec. [17.060](#))
 - Requires Grand Lodge Judiciary approval before enactment.
- ▣ Officers and Committees

The Lodge – Not “The Club”

- ▣ Budget
 - Controlled by the Lodge – not the Board of Directors.
 - A “roadmap” if you will. Not an authorization to spend funds.
- ▣ Income
 - Sources and anticipated amounts.
- ▣ Expenses
 - Lodge must authorize expenditure of funds by specific motion.

The Lodge – Not “The Club”

- ▣ Board of Directors
 - At all times subject to control and direction of the Lodge.
 - Investments and insurance
 - ▣ Board of Directors may suggest, but Lodge decides. However, in the absence of specific direction, the decisions are left to the sound discretion of the Board.
- ▣ Governing Body (House)
 - At all times subject to control and direction of the Lodge.
 - House Rules
 - ▣ Subject to approval by the Lodge.
 - ▣ Requires Grand Lodge Judiciary approval before enactment.

The Lodge is a Business

- ▣ The Lodge, like a business, requires effective management; this is true no matter what size your Lodge.
- ▣ Even if you don't have a major lounge or food service operation, just to keep the Lodge running on a prosperous basis requires good management skills.
- ▣ You have a substantial budget to work against, committees and program to organize, social functions to develop and schedule.

The Lodge is a Business

An Elks Lodge encompasses all of the facets of a business operation:

- ▣ Planning & Forecast
- ▣ Capital Spending
- ▣ Accounts Receivable
- ▣ Accounts Payable
- ▣ Personnel
- ▣ Payroll

Management

Management – by definition, means:

- ▣ To control movement or behavior
- ▣ To handle, have charge of, direct
- ▣ To administer
- ▣ To influence a person to assist in accomplishing your goals.

Management

To Implement Good Management requires:

- ▣ Skill
- ▣ Tact
- ▣ Diplomacy
- ▣ Flattery
- ▣ Discipline

Good Management

- ▣ The most important ingredient of “Good Management” is to know your business. Is it a profitable operation, or is it losing money? Frankly, many of our Lodges simply don’t know which side of the ledger they’re on.
- ▣ You’ve got to be looking at your operation on a regular basis to know where you are; and you’ve got to know what you’re looking for if you expect to make improvements.

Good Management

- ▣ Commitment & Organization of Time:
 - You must be able to devote the proper amount of time and organize your schedule so as to spend the time necessary to do a good job.
- ▣ Understanding of Objective
 - You have to have an understanding of what it is you are supposed to accomplish
- ▣ Development of an Action Plan
 - Without a plan of some sort, you will lose sight of your objective and accomplish little or nothing.
- ▣ Implementation
 - All the planning in the world goes for naught if you don't effectively implement the plan.

Good Management

- ▣ Follow-Through
 - Once the plan is implemented, you must follow up and keep things on track. Many a good program went down the drain for lack of follow-through.
- ▣ Evaluation
 - Periodic evaluation is also important.
 - ▣ How is the plan working?
 - ▣ Are the desired results being achieved?
 - ▣ If not, should a change in the plan be made? Or a change in workers?

Stay flexible and don't be afraid to make necessary changes

Good Management

- ▣ Communication
 - Probably the key element in the whole scheme of good management.
 - ▣ Keep your team informed.
 - ▣ Keep the Lodge informed.
- ▣ Keep good records; make timely reports.
- ▣ Tell people what you expect,
 - What they can do to help
 - What has (or has not) been accomplished.

Good Management

Good Management Skills come from:

Knowledge

- ▣ What you've learned about the requirements of the job.
- ▣ What you know about your people; the “workers.”
- ▣ What you know about past efforts and accomplishments.

Good Management

Good Management Skills come from:

Experience

- ▣ Technique you've acquired in other positions of responsibility within the Order of Elks.
- ▣ Skills acquired in job assignments at your place of employment.
- ▣ Mistakes you have overcome and resolved

Good Management

Good Management Skills come from:

Confidence

- ▣ Confidence comes from continued satisfactory and productive effort.
- ▣ Confidence comes from success.
- ▣ Success breeds confidence. If you've successfully handled a responsible assignment in the past, you just know you can handle this one.

Good Management

Good managers are leaders:

“Bosses create fear, a leader, confidence. A boss fixes blame, a leader corrects mistakes. A boss knows all, a leader asks questions. A boss makes work drudgery, a leader makes it interesting”

Russell H. Ewing

Take me out to the ball game...

Take a look at a successful baseball team:

- ▣ Each player has their position to play
- ▣ Everyone works together to cover other positions as needed
- ▣ Everyone needs to be flexible and ready to handle any situation
- ▣ Even with “a star player” it still takes the entire team to win

All Officers – A Team Effort

Like a baseball team player, each officer has individual responsibilities, but it takes teamwork to run a successful Lodge.

- ▣ Be alert to membership “pulse”
- ▣ Be aware of attitudes, likes and dislikes, ideas and suggestions.
- ▣ Be cooperative with each other, with the members, with your auxiliary organization.

All Officers – A Team Effort

- ▣ Be accommodating whenever possible.
- ▣ Be considerate
- ▣ Display kindness, thoughtfulness and Brotherly Love.
 - Visit an ailing member – or spouse, send a card, call on the phone. (They'll feel good and so will you.)
- ▣ Respect the views of others; be attentive and show concern.
- ▣ Set Good Examples (“Lead by Example”)

All Officers – A Team Effort

- ▣ Support the Exalted Ruler and the programs of the Lodge.
- ▣ Attend Lodge meetings and Lodge social functions.
- ▣ Support Grand Lodge programs, subscribe to the National Foundation.
- ▣ Support the State Association, subscribe to the Major Project.

All Officers – A Team Effort

- ▣ Attend Orientation programs, include new Members in all things.
- ▣ Be enthusiastic – it's contagious
- ▣ Perform Ritual Well (GLS, Sec. [12.130](#))
 - All Ritual, not just Initiation
 - Study your part, know what it means.
 - Practice and strive for perfection and a meaningful presentation.

All Officers

- ▣ Hold Regular Officer Meetings
 - Meet at least monthly to discuss status, direction and progress.
- ▣ Work Together As a Team - this is the key to your total success.
 - Carry your share of the load.
- ▣ Develop a sense of pride and honor.
- ▣ The Officers who work well together as a team almost always have a Lodge that is successful in nearly every endeavor they undertake.

Before we go on...

One should accept advice from others; however, it is always worthwhile to be well informed as to the proper procedures of our Order. Many Elks who have held high positions and have years of membership, have never properly studied the Statutes & Regulations of Elkdom. Their advice, although well meant, might be contrary to the Grand Lodge, and as such, place you or your Lodge in an embarrassing situation.

When in doubt about Statutory requirements, ask your District Deputy Grand Exalted Ruler. They are there to help you!

To Summarize

We can put these ideas into an “Equation” which would look like this:

Knowledgeable and Dedicated Officers +
Knowledgeable and Dedicated Committeemen +
Good Management Skills +
Teamwork =
A Successful Lodge.

The Final Word

- ▣ The final word is YOU! *You* make the difference:
 - You – The Officers; every one, not just the Exalted Ruler.
 - You – The Board of Directors and Governing Body.
 - You – Each of you individually and all of you collectively.

The End

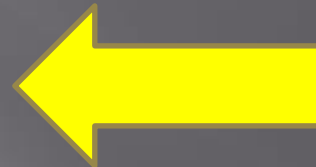
Thank You!!

Section 17.060.

Amendments to or general revisions of By-Laws, Rules of Order and House Rules of a Lodge shall be proposed in writing, read at a regular meeting of the Lodge and laid over for a vote at a regular Lodge meeting to be held not less than two (2) weeks nor more than ten (10) weeks thereafter. Notice setting forth the proposed changes to the By-Laws, Rules of Order and House Rules shall be sent to all Members at least ten (10) days before the regular meeting at which the proposed amendment or general revision is to be voted upon. A majority vote of Members at the meeting shall be required for adoption.

Section 17.060.

Not later than during the fifth year following the adoption of its original By-Laws and Rules of Order, or of a general revision thereof, each Lodge shall prepare and file a current general revision of the By-Laws, Rules of Order and House Rules. The Lodge shall use the latest form of By-Laws and Rules of Order prepared by the Grand Secretary, and House Rules in a form approved by the Lodge. Any general revision of By-Laws and Rules of Order shall be accompanied by a general revision of House Rules.



Section 12.130.

The Exalted Ruler, with approval of the Lodge, may appoint Members of the Lodge especially qualified to organize degree teams for the exemplification of the Rituals, except for the Opening and Closing of Lodge meetings and the Initiatory Ritual, provided, however, the Lodge may, by an Amendment to its By-Laws, provide for a degree team, not necessarily composed of the duly installed Officers of the Lodge, for the rendition of the Initiatory Ritual.

Section 12.130.

The Team shall consist of Members of the Lodge, especially qualified in rendition of the Initiatory Ritual appointed by the Exalted Ruler with approval of the Lodge, and who shall perform the Initiatory Ritual from memory. All elected and appointed Officers shall have the right to be a part of the degree team at their elected or appointed station.

