

**CHECK SHEET FOR LODGE OF ITEMS REQUIRED FOR DISTRICT DEPUTY VISIT**  
(To Be Completed By DISTRICT DEPUTY And Returned With Visit Report For Each Lodge)

LODGE NAME AND NUMBER: \_\_\_\_\_ DATE: \_\_\_\_\_

YES	NO	<u>I WILL WANT TO SEE:</u>
_____	_____	1. Visitors Register — Code 553400
_____	_____	2. Lodge Charter displayed (or Dispensation, if Charter not yet issued)
_____	_____	3. Judiciary-approved Lodge By-Laws (sufficient supply for membership)
_____	_____	4. Judiciary-approved House Rules (sufficient supply for membership)
_____	_____	5. Seal of the Lodge
_____	_____	6. Accident/Claim Prevention Manual — Code 513100 — {April 2002}
_____	_____	7. Americanism Committee Manual — Code 512000 — {October 1998}
_____	_____	8. Annotated Statutes — Code 520100 — {Latest Edition-Annual}
_____	_____	9. Auditing, Accounting and Management Manual — Code 510100 — {August 2001}
_____	_____	10. Auditing & Accounting Committee Manual — Code 510000 — {August 2001}
_____	_____	11. Directory of Subordinate Lodges — Code 553700 — {Annual}
_____	_____	12. Drug Awareness Manual — Code DAP125 — {March 2003}
_____	_____	13. Elks National Foundation Chairman Handbook — Code 513300
_____	_____	14. Elks National Veterans Service Commission Manual — Code 513500 — {August 2002}
_____	_____	15. Government Relations Manual — Code 511000 — {February 1998}
_____	_____	16. Grand Lodge and State Associations Directory — Code 553800 — {Annual}
_____	_____	17. Grand Lodge Proceedings — Code 511400 — {Latest Edition-Annual}
_____	_____	18. Grand Lodge Program Booklet — Code 514000 — {Annual}
_____	_____	19. History of the Order — Code 511300 — {1992}
_____	_____	20. Indoctrination Program Video — Code 533200 — {2000}
_____	_____	21. Investigation/Interview Committee Manual — Code 510200 — {January 2002}
_____	_____	22. Leadership Training Booklets (set of 5) — Code 511900
_____	_____	23. Liability Insurance Program Manual — Code 513000 — {Annual}
_____	_____	24. Lodge Activities Manual — Code 510300 — {September 2001}
_____	_____	25. Media Relations Manual — Code 5107-1 — {April 1999}
_____	_____	26. Membership Manual — Code 510400 — {August 2001}
_____	_____	27. Exalted Rulers, Lodge Officers and Committee Members Manual — Code 510500 — {January 2002}
_____	_____	28. Property Plus Insurance Manual — {Obtained from MARSH, Inc.}
_____	_____	29. Protocol Manual — Code 510600 — {March 2003}
_____	_____	30. Report of the Elks National Foundation — {Annual}
_____	_____	31. Ritual B. P. O. Elks — Code 511500 — {September 2001}
_____	_____	32. Rituals of Special Services — Code 511601 — {June 1999}
_____	_____	33. Ritualistic Contest Manual — Code 519900 — {Annual}
_____	_____	34. Robert's Rules of Order — Code 511700
_____	_____	35. Secretary's Manual — Code 510800 — {August 2000}
_____	_____	36. Youth Activities Committee Program Manual — Code 512100 — {November 2000}
_____	_____	37. Current Pice List — Grand Lodge Supplies — Code 572500
_____	_____	38. Charity Records Booklet — Code 511100 — {Annual}
_____	_____	39. Constitution and Statutes (latest edition) — Code 520200 — (sufficient supply for membership)
_____	_____	40. What It Means To Be An Elk (Candidate Booklet) — Code 511200 — (sufficient supply for membership)
_____	_____	41. Elks Soccer Shoot® Manual — Code 513800 — {August 2002}

YES	NO	<u>I WILL WANT:</u>
_____	_____	1. Copy of annual Lodge Budget as adopted by the Lodge
_____	_____	2. Copy of Club Managing Body Budgets (Club, Dining Room, Health Room, Swimming Pool and Golf Course) as adopted by the Lodge.
_____	_____	3. Detailed record of Charity Fund income, expenses, balance and plans

YES	NO	<u>I WILL WANT TO EXAMINE:</u>
_____	_____	1. Minute Book of proceedings of the Lodge
_____	_____	2. Ledger containing the name of each member, birth place, etc.
_____	_____	3. Alphabetical list of expulsions, suspensions, and rejections
_____	_____	4. Account books to clearly present receipts and accounts of the Secretary and Treasurer and general financial and other transactions of the Lodge and Club, or any facility operated by them.
_____	_____	5. Charity Records Booklet with up-to-date entries
_____	_____	6. Forum Box — Code 5323
_____	_____	7. Minutes of P.E.R. Association meetings
_____	_____	8. Minutes of Board of Trustees' meetings
_____	_____	9. Minutes of Club Managing Body meetings
_____	_____	10. Minutes of meetings of corporations connected with the Lodge
_____	_____	11. Self-inspection checklist of accident prevention manager.
_____	_____	12. Certificate of Magazine Update

2

**LODGE SECRETARY WILL HAVE THE SUCCEEDING INFORMATION READY AND  
LAID OUT FOR DISTRICT DEPUTY VISIT, IN THE FOLLOWING ORDER**

---

Lodge Name and Number \_\_\_\_\_ Date \_\_\_\_\_

1. All items on the attached check sheet, in listed order.
2. Current membership \_\_\_\_\_, and year-to-date ENF donations \$ \_\_\_\_\_.
3. Elks Magazine Certificate, Membership Roster update. Date issued \_\_\_\_\_.
4. Copy of Grand Lodge Area Auditing & Accounting Committee evaluation form.
  - a) Have GL Committee questions or comments been replied to and/or complied with? ☐ Yes ☐ No
5. Date IRS Form 990/990T mailed \_\_\_\_\_.
6. Copy of Lodge By-Laws with general revision date. Date \_\_\_\_\_.
7. Copy of Lodge House Rules with general revision date. Date \_\_\_\_\_.
8. Salaries: Secretary \$ \_\_\_\_\_; Treasurer \$ \_\_\_\_\_; Tiler \$ \_\_\_\_\_; Organist \$ \_\_\_\_\_.
9. Initiation fee \$ \_\_\_\_\_; Annual Dues \$ \_\_\_\_\_; Reinstatement fee \$ \_\_\_\_\_.
10. Amount of fire insurance \$ \_\_\_\_\_; date when last adjusted \_\_\_\_\_.
11. Number of meetings missed by Lodge Officers, to date:  
E.R. \_\_\_\_\_; Leading Knight \_\_\_\_\_; Loyal Knight \_\_\_\_\_; Lecturing Knight \_\_\_\_\_; Secretary \_\_\_\_\_;  
Treasurer \_\_\_\_\_; Tiler \_\_\_\_\_; Esquire \_\_\_\_\_; Chaplain \_\_\_\_\_; Inner Guard \_\_\_\_\_; Organist \_\_\_\_\_;  
1 year Trustee \_\_\_\_\_; 2 year Trustee \_\_\_\_\_; 3 year Trustee \_\_\_\_\_; 4 year Trustee \_\_\_\_\_; 5 year Trustee \_\_\_\_\_.
12. Is the Lodge incorporated? ☐ Yes ☐ No Date of incorporation \_\_\_\_\_.
13. What is current combined indebtedness of Lodge? \$ \_\_\_\_\_.
14. Current Profit/Loss Statement for each entity (Lodge, Club, Bingo, etc.).
15. Has Exalted Ruler appointed a Presiding Justice? ☐ Yes ☐ No; a Mediator? ☐ Yes ☐ No (GLS 13.020)
16. Does Lodge have Ritual coaching and are Lodge Officers able to recite Rituals from memory?  
☐ Yes ☐ No
17. Has Exalted Ruler scheduled an Elks Training Session? ☐ Yes ☐ No  
Will that be done? ☐ Yes ☐ No
18. Do Lodge Secretary and Board of Trustees submit written transaction reports to the Lodge at 1st sessions  
in April and October? ☐ Yes ☐ No
19. Does Lodge have an active P.E.R. Association and do they hold required meetings? ☐ Yes ☐ No  
(GLS 13.190)

Please have P.E.R. Association minutes available for District Deputy! Minutes of this body should be held in the Lodge office and be available at all times. All funds generated or held by a P.E.R. Association, other than P.E.R. Association Dues, belong to the Lodge, may only be used if budgeted and approved by the Lodge, and are subject to audit by the Lodge. (GLS 13.190, Opinion 02)