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Benevolent & Protective Order of Elks
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MANUAL FOR INVESTIGATION/INTERVIEW COMMITTEE

Introduction

The selection of qualified candidates for membership is important for the continued success of the Lodge. In addition to the responsibility of the proposer to sponsor applicants based on personal knowledge of the candidate's character, the Laws of the Order require that a Local Lodge Investigation/Interview Committee thoroughly examine each applicant.

The examination should reveal if the applicant:

1. Meets the qualifications for membership as set forth in the Constitution and Laws of the Order.
2. Understood each of these questions.
3. Answered the questions on the application form truthfully.
4. Understands and agrees with the purposes of the Order.
5. Is socially and financially acceptable.
6. Intends to participate in Lodge programs.

PURPOSE: The purpose of a good investigation/interview is to assure that new applicants will be well-informed of the objectives of membership in the Elks and are socially and fraternally compatible with other Members of the Lodge. Completed correctly the process eliminates confusion and misconceptions concerning membership into the Order of Elks. Applicants gain:

- A clear understanding of their duties and responsibilities.
- An appreciation for what it means to be an Elk.
- The value of an Elks Lodge to the community.

In addition, the process should further energize the heart-felt spirit of the applicant and reinforce the positive motivation to join the Order.

NOTE: Masculine words appearing in the quoted Laws of the Order include the feminine gender as circumstances require.

The requirement to evaluate applicants for membership in the Benevolent and Protective Order of Elks is located in Section 14.010 of the Laws of the Order, which provides in part:

“Each application shall, at the meeting at which it is read, be referred to the standing Membership Committee which, after completing its duties, shall report at the next regular Lodge meeting or as soon thereafter as practicable. The Secretary shall mail notice in writing to all Members of the Lodge, giving the name and address of each applicant, his business, the name of his proposer, and the time when action will be taken upon such application.”

Completion of this process should be expedited so as not to extend the time it takes to complete the process of bringing new Members into the Lodge. Even when the investigation and orientation are completed in a minimum of time, it often seems to take forever.

In addition to Section 14.010, the Exalted Rulers, Lodge Officers and Committee Members Manual adds the following to guide the Investigating Committee in its work:

“This Committee is authorized under Section 13.080 of the Laws of the Order to conduct an investigation into the basic and acceptable qualifications of candidates for membership in the Lodge. Its importance to the welfare of the Lodge cannot be overemphasized.”

During the 1971 Grand Lodge Convention, the delegates approved adding an Investigation Committee to the list of Statutory Committees required by every Local Lodge. During 1994, the Investigation Committee became a Sub-Committee of the Lodge Membership Committee. The Laws of the Order read:

Section 13.020: The Exalted Ruler, at the first meeting after his installation, shall appoint ... not less than three Members to each of the following Committees ... Membership Committee ...

Section 12.020: The Exalted Ruler... shall: **b.** Appoint all Committees... designating the Chairman thereof.

Section 13.080: The Membership Committee shall carefully examine the character of all applicants for membership, verify their statements made in the application and report thereon at the next regular meeting of the Lodge or as soon thereafter as practicable. The Committee shall require that applicants personally appear before the Committee and may require the proposer or proposers of an applicant to appear before the Committee.

While it is not the purpose of the Grand Lodge to establish specific procedures or rules, it is apparent from the practices of many Lodges that improved applicant interview methods are needed. Each Lodge is encouraged to consider the suggestions in this manual and strengthen its investigation/interview procedure. Doing so will ensure the quality of Members is high and involvement promoted.

Committee Selection

Careful selection of the Committee Members is advised. Committee Members must be qualified to evaluate applicants for membership and their interest in the image and welfare of the Lodge. Therefore, Committee Members should be selected from the Lodge's most knowledgeable Elks. They must be willing to ensure a fair and unbiased appraisal of the applicant's character and worthiness for membership. No applicant should be approved without appearing for a personal interview before the Committee. To determine eligibility for membership, the Committee is obligated to employ all the appropriate resources to gather information concerning the applicant, to include checking references.

The most effective approach to begin examining candidates is for the Committee to believe that new Members are the “Crown Jewel” of the Order. In this regard it is the Committee’s charge to accumulate information that will help build an organization of involved high performers.

The Exalted Ruler should select Committee Members who are knowledgeable of Lodge history, activities and charities, and represent a cross-section of the community. Past Exalted Rulers are particularly valuable on the Committee because of their experience in the Lodge and community, and their knowledge of Lodge policies and procedures. Members from the business and professional segments of the community, administrative representatives of other organizations and law enforcement personnel can also make important contributions. It is suggested that some Members from the previous year’s Committee should be retained to ensure continuity of examination, consistency of the interview procedures and adherence to policies.

In larger Lodges, it may be necessary to appoint a large number of Committee Members, if a private examination is requested. A subcommittee can be appointed to conduct the interview and report its findings to the full Committee.

Investigation Process

Applicants for membership must be sponsored by a Member of the Order. An application form is supplied by and printed by Grand Lodge. The application **must** be completed in its entirety and signed by the applicant and the sponsor (proposer). [Exhibit 1] The application, accompanied by the appropriate fees as provided in the by-laws of the Lodge, is then filed with the Lodge Secretary.

Completing the application in its entirety includes checking Civic/Community and Lodge Activity Committee preferences on the back panel of the application. While the information provided is useful in completing the applicant interview, it is more important in providing for the activation of the applicant once he or she has been initiated. Toward that end, it is suggested that the Lodge create a database that can be sorted either by name or committee/activity interest.

It is recommended that the Lodge send applicants a letter [Exhibit 2] acknowledging receipt of the application. In addition, each applicant should be provided a copy of the “What It Means To Be An Elk” booklet and information about the State Major Project and Elks National Foundation.

The Lodge Secretary is required to read the application at a regular Lodge meeting under the heading, “Item J: Propositions for Membership,” (Section 15.020) in the Order of Business. The Exalted Ruler then refers the application to the Membership Committee.

It is the responsibility of the Investigation/Interview Committee to verify the statements made by the applicant in the application. In addition, the committee should evaluate if the applicant would be an asset to the Lodge.

The proposer has a responsibility to be well-acquainted with the candidate and the individual’s reputation, background, moral fiber, employment status, professional character, family situation and personal matters/habits. The Committee should interview the proposers personally or require them to complete a questionnaire regarding their knowledge of the candidate. The purpose of the interview or questionnaire is to assist the Membership Committee (Section 13.080) in its deliberations and recommendation. A sample questionnaire is shown in the appendix [Exhibit 3].

In addition to the information gained from the proposer, the Committee (Section 13.080) should contact the references listed on the application. Often, this can be obtained by mail using a form similar to that sent the proposer [Exhibit 3]. If any unusual or confidential information is involved, the reference may prefer to provide a statement to the Committee in person. Section 14.010 of the Laws of the Order states the importance of a thorough examination of an applicant’s references when the applicant has lived within the jurisdiction of the Lodge for less than five years. Section 14.010 states:

“If within five years from the date of an application the applicant has resided within the jurisdiction of another Lodge, the applicant shall on his application give the names and addresses of at least two citizens residing in the jurisdiction of such Lodge. A copy of the application may be sent to said Lodge by the Lodge Secretary to which the application was made. The Exalted Ruler of the Lodge to which the application is referred shall, at the next regular meeting, refer the application to the Membership Committee. The Committee shall carefully inquire as to the character and fitness of the applicant while he was a resident within the jurisdiction of their Lodge and verify statements made in the application to the best of their ability. The Committee shall make a report of its findings to the Secretary of their Lodge who shall record the report in the minutes of the next regular Lodge meeting. The Secretary shall forward the report to the Secretary of the referring Lodge. The report shall be recorded in the minutes of the next regular meeting of the Lodge submitting the application. No vote shall be taken upon the application until the Membership Committee of the Lodge to which the application was referred has made a report and the report has been read in the Lodge referring the application.”

A sample transmittal letter appears in the appendix [Exhibit 4]. While it is not mandatory, out-of-jurisdiction references, Section 14.010, establish a procedure to follow.

Many Lodges prefer that Committee Members visit the applicant’s home so that information regarding the home and family can be obtained firsthand. This is usually accomplished using a sub-committee (Section 13.080). An evaluation of the family’s attitude toward the applicant joining the Order is important. A long-term, active Elk is more likely to result if the applicant has a supportive family. The visit also provides an opportunity to share information about the Lodge, and Lodge and community activities with the applicant’s family.

The Committee continues to gather information about the applicant using appropriate resources and references listed by the applicant. The Committee then reviews the application and, unless there is some obvious disqualification for the Committee to make an adverse recommendation, the applicant is asked to appear before the Committee for an interview. A sample letter of invitation [**Exhibit 5**] is included in the appendix. It is strongly recommended that the applicant's proposer be invited to attend the personal interview. [See sample letter [**Exhibit 6**] in the appendix.]

The interview should be conducted in a businesslike but informal and friendly manner. Avoid asking frivolous, impertinent or unnecessarily embarrassing questions. Use an established list of questions to ensure complete information gathered and consistency of the interview process. A sample list of questions appears in the appendix [**Exhibit 7**]. The applicant's responses to the questions should be recorded and placed in the applicant's permanent membership file.

It is a good practice to begin the interview with a review of the applicant's responses to questions on the application form and inquire if all the questions were understood.

The applicant should be advised that the Order, while social in character, is committed to its patriotic and youth activities, community service program and many charities, all of which the applicant may participate in once a Member.

Next, Section 14.010 of the Laws of the Order, which specifies the qualifications for membership, should be reviewed with the applicant. The applicant's response(s) should be recorded. It is important that the applicant has a clear understanding that the qualifications are life-long commitments.

The Constitution and Laws of the Order require an applicant to be:

- A citizen of the United States
- Of good character
- Over age 21
- A believer in God who is willing to attest to that belief
- Neither directly or indirectly, participating in the activities of any group or organization, or supporting or adhering to beliefs or tenets advocating the overthrow of the Government of the United States or any political subdivisions by force or violence.

Instances have occurred where Members have claimed that they were unaware of these membership requirements. Some have stated that they would not have joined if they had known them. Unless an applicant carefully reads the application for

membership or is told of the qualifications for membership in advance, he or she may not be completely aware of the requirements. Only after initiation is the new Elk given the Constitution and Laws of the Order. No one should be elected to membership under false pretenses. Applicants unwilling to abide by the Order's rules for membership should withdraw the application at this point.

All applicants should be interviewed by the Committee. Even an applicant considered to be of the highest character and well known to the Committee should have the usual reference check and other verifications completed and appear before the Committee.

While the interview should be based on the established questions, Committee Members may elect to ask additional or followup questions based on the applicant's responses. After the interview, the Committee should take a recorded vote. If favorable, the Committee should report its recommendation during to the next regular Lodge meeting under agenda "Item K, Reports of Committees on Applications," in the Order of Business.

Applications for Reinstatement, Transfer and Absolute Dimits

The same procedures as those for new Members are followed for applicants for reinstatement, Certificates of Release, and Transfer and Absolute Dimits. While the application forms differ and some of the evaluations are changed because of present or previous membership in the Order, the Committee must still determine the accuracy of the statements on the application, worthiness of the applicant and prepare a recommendation for the Lodge. It is recommended that the same procedure used to verify references listed by new Members should be employed.

When considering applicants for reinstatement, the ability to pay dues and other financial obligations of membership should be evaluated as these may have been the cause of the Member being dropped previously.

When considering a Transfer Dimit or Certificate of Release, a written inquiry should be made of references in the community from which the applicant originates. Processing time is always a consideration. With Transfer Dimits, membership is continuing and only the bridging of a dues period is of real concern.

Absolute Dimits should be reviewed in the same manner as Transfer Dimits, especially if issued by another Lodge. Usually, a Member applying for admission by Absolute Dimit need not be questioned closely regarding the reasons for taking a dimit. This is the statutory method of becoming an inactive, non-dues-paying Elk.

Unfavorable Action by Committee

If applicants are carefully reviewed, there should seldom be an unfavorable ballot — a goal toward which every Lodge should strive. The rejection of applicants by ballot may have serious repercussions. It could be embarrassing to the applicant, the proposer, references and the Lodge. All balloting on candidates must be accomplished by secret ballot. The result of a ballot is confidential. The result cannot be discussed outside the Lodge Room. Discussion of confidential information outside the Lodge Room may result in negative consequences for the Member or Lodge.

Each application requires disposition — favorable, unfavorable or withdrawn. If the proposer does not withdraw the application, the Committee must then return the application to the Secretary with an unfavorable recommendation. The unfavorable report would be made to the Lodge at the next regular meeting under “Item K,” Report of Committees on Applications, in the Order of Business. Even after the reading of the unfavorable report before the Lodge, the proposer can still withdraw the application at any time before the reading of the applicant’s name for ballot as provided in Section 14.040 of the Laws of the Order.

If the Committee decides to make an unfavorable recommendation, the Committee Chairperson, after consultation with the Exalted Ruler, should discuss the recommendation with the proposer. See **Exhibit 8** for a sample letter requesting such a meeting. This presents the option of withdrawing the application before the recommendation is reported to the Lodge. Doing so avoids an unfavorable report that, as indicated previously, could prove embarrassing. Section 14.040 of the Laws of the Order provides that an application can be withdrawn by the proposer in open Lodge at any time before reading the applicant’s name for ballot, unless three Members object to withdrawal.

Committee Report to the Lodge

Section 14.010 of the Laws of the Order requires that all applications be reviewed as rapidly as is reasonable. The statute requires that the Committee

“report thereon at the next regular Session of the Lodge, or as soon thereafter as practicable...”

After the Committee has completed its investigation, the results are reported to the Lodge. Usually, the reports are provided to the Secretary, who reads them to the Lodge. The Exalted Ruler then establishes a date for balloting on the application at which time the Lodge Members vote by secret ballot.

The Committee is not required to detail the source or nature of the information that it obtains in the review. The

character of its assignment demands that the Committee be given wide discretion in this respect and that the Members of the Lodge have confidence in the fairness of the Committee recommendations. Whenever the question of the applicant’s qualifications for membership is properly before the Lodge, any Member may question the committee’s reasons for its report. If the committee will not or cannot provide a sufficient reason for its recommendation, Members of the Lodge may take that into consideration when determining the weight the report should have on their decision relative to the applicant’s worthiness.

Conclusion

Once the application has been approved by the Lodge, the process continues with notifying the candidate and proposer of election and setting the dates for orientation and initiation. See **Exhibits 9 and 10** for sample letters. It cannot be stressed enough how important orientation before initiation is to the candidate. In addition, initiation will be more meaningful if the candidate has been properly oriented before-hand.

To welcome new candidates, Exalted Rulers are advised to send a letter of congratulations (**Exhibit 11A**) to them. New candidates should be asked to complete the New Member’s Committee Preference List (**Exhibit 11B**) to return at the time of initiation.

Acquainting new Members with Lodge activities and the existing Members usually results in more active Members who are less likely to be dropped for nonpayment of dues. The Orientation Section of the Membership Program and Planning Manual (Code No. 510400) offers advice on investigating and interviewing prospective Members.

The Laws of the Order delegate the responsibility for orientation in the Lodge. A Lodge with only one or two candidates might be tempted to forego the orientation and initiate the candidates immediately, intending to include them in a subsequent orientation conducted for a large group. But, once initiated, there is no provision in the Laws of the Order that mandates a new Member’s attendance to an orientation session. As this omission is allowed to recur, the Lodge will soon find it easy to ignore any form of orientation. In the end, the Lodge might vainly try to build its rolls and programs with people unaware of Elksdom’s purpose and more likely to decrease in membership.

The best orientation programs are those held using a social format — hors d’oeuvres, tapa, snacks, dinner or dessert and coffee. The candidate and spouse, the proposer and spouse, and the Lodge Officers and their spouses should be invited by the committee as guests of the Lodge. A sample letter to be sent by the Exalted Ruler [**Exhibit 12**] may be used to invite the proposer and spouse.

APPENDIX

- Exhibit 1** Application for Membership
- Exhibit 2** Thank You for Submitting an
Application for Membership
- Exhibit 3** Proposer Questionnaire
- Exhibit 4** Referring Application for Membership
in Area of Former Residence
- Exhibit 5** Request for Applicant Interview
- Exhibit 6** Request for Proposer to Attend
Applicant Interview
- Exhibit 7** Interview Checklist
- Exhibit 8** Notice to Proposer for Conference
- Exhibit 9** Applicant Notice of Acceptance
- Exhibit 10** Proposer Notice of Election,
Orientation and Initiation
- Exhibit 11** Notice to Applicant of Acceptance
- Exhibit 12** Notice to Proposer of Election, Orientation
and Initiation of Candidate

[APPLICANT]

Check the Committee Preferences from the lists below:

CIVIC/COMMUNITY

Americanism _____ State Major Project _____
 Blood Drives _____ Law and Order _____
 Boy/Girl Scouts _____ Other _____
 Charity _____ Scholarship _____
 Community Affairs _____ Summer Camps _____
 Community Welfare _____ Veterans Services _____
 Drug Awareness _____ Youth Activities _____
 Elks Hospitals/Clinics _____ Youth Sports _____
 Essay/Poster Contests _____

LODGE ACTIVITIES

Auditing/Financial _____ Games _____
 Bingo _____ Greeter _____
 Breakfast/Dinners _____ Lodge Bulletin _____
 Bridge/Card Clubs _____ Lodge Visitation _____
 Building Maintenance _____ Membership _____
 Bus/Boat Trips _____ Other _____
 Charity Fund-Raising _____ Parties/Dances _____
 Conventions _____ Photography _____
 Decorations _____ Public Relations _____
 Entertainment _____ State Major Project _____
 Elks National Foundation _____ Team Sports _____
 Family Activities _____ Visitation of Sick _____
 I would be interested in serving as an Officer of the Lodge (Yes/No) _____

[PROPOSER]

I understand that standards for becoming a Member of the Order of Elks are high, that membership is attained by invitation only, and is limited to persons of good moral character who believe in God.

In proposing this applicant for membership, I attest that I have known the applicant for _____ (Months/Years), that he/she is morally, socially and financially responsible; and, in my opinion, will become an active Member who supports our beliefs.

In the event that the applicant is approved and accepted, I pledge my personal interest to his/her development and progress in becoming an active Member who exemplifies the principles of the Benevolent and Protective Order of Elks of the United States of America.

Signature _____

Membership Number _____ (Date) _____

[PROPOSER REFERENCES]

11A) *Provide two references other than the Proposer. All must be Members of the Order.*

Name _____ Membership No. _____
 Lodge Name & No. _____
 Home Address _____
 Business Address _____
 Telephone _____ E-mail _____
 Name _____ Membership No. _____
 Lodge Name & No. _____
 Home Address _____
 Business Address _____
 Telephone _____ E-mail _____

11B) *List all places of residence and your occupation for the 5 years preceding the date of this application if different from the residence or occupation given on reverse side.*

Place of Residence _____
 Date (Establishment changed): _____ Telephone: _____
 Occupation: _____ Telephone: _____
 Date (Established/Changed): _____ Telephone: _____
 Occupation: _____ Telephone: _____

[PROPOSER'S SIGNING RECORD]

Signature of Proposer _____
Signature of Committee Member _____
Signature of Committee Member _____
Signature of Committee Member _____
Signature of Committee Member _____

To be completed by the Lodge Secretary

Result of Ballot _____ Accepted _____ Rejected _____

Action	Date
Application Received	
Initiation Fee Paid (\$)	
Read on the Lodge Floor	
Balloting on Candidate	
Applicant Notified of Result or Balloting	
Indoctrination	
Prorated Dues Paid (\$)	
Initiated	
Membership Number Assigned	
Member Information Entered in CLMS	

MEMBERSHIP APPLICATION

*An Invitation to Join the
 Benevolent and Protective
 Order of Elks of the
 United States of America*



"Elks Care — Elks Share"

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date

Name of Applicant

Address

City, State, ZIP

Dear *(Applicant's Name)*

Thank you for submitting an application for membership in *(Lodge name and number)*. Your application will be reviewed and submitted to the Lodge for approval as quickly as possible.

As part of the review process it will be necessary for you to be interviewed by the Lodge Investigation Committee. You will be contacted by the Lodge Secretary to schedule a time for you to meet with the committee.

A copy of "What it Means to be an Elk" is enclosed. The booklet will provide you with information about programs and the history of the Order of Elks. The booklet is designed especially for applicants for membership. We encourage you to read it prior to the date of your meeting with the committee.

Please contact me, the Lodge Secretary (Name) at *(Telephone # and e-mail address)* or your sponsor should you have any questions or need additional information relative the Order of Elks or *(Lodge Name and Number)*.

Again thank you for applying to become a Member of the Lodge. I am positive you will find your membership a rewarding experience for both you and your family.

Sincerely yours,

Exalted Ruler

cc: *(Proposer's Name)*

Enclosure

**BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
“Proposer’s Questionnaire”**

Date _____

Name of Applicant _____

Address _____

QUALIFICATIONS FOR MEMBERSHIP REQUIRE THAT AN APPLICANT BE A CITIZEN OF THE UNITED STATES, OF GOOD CHARACTER, AT LEAST TWENTY-ONE YEARS OLD, A BELIEVER IN GOD, AND IN NO WAY CONNECTED WITH THE COMMUNIST PARTY OR AN ADVOCATE OF OVERTHROWING OUR GOVERNMENT BY FORCE.

1. How long have you known the applicant? _____ (years)
2. Is your acquaintance: Business _____ Social _____ Casual _____ Relative _____
3. Is the applicant: Single _____ Married _____ Divorced _____
Number of Dependent Children _____
5. Provide your personal appraisal of the applicant:
Reputation for honesty and fair dealing. _____

Habits/attitudes regarding liquor. _____

Habits/attitudes regarding gambling. _____

6. List any clubs, organizations or Lodges of which you are aware the applicant is a member.

7. Has the applicant ever been rejected, expelled, or dropped from membership in any club, organization or Lodge? _____
If yes, list. _____

8. Can the applicant afford membership in the Lodge? _____
9. What is the applicant’s family’s attitude toward his/her joining the Lodge?

10. In which committee(s), activities, or leadership role(s) is the applicant interested?

The answers above are provided to the best of my knowledge and belief.

Signed

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME, NUMBER AND ADDRESS
(Lodge Letterhead)

Date

(Name) _____, Exalted Ruler
_____, Lodge, B.P.O. Elks

Address

City, State, ZIP

Dear Exalted Ruler:

(Name of Applicant) has been proposed as a new Member of *(Lodge Name and Number)*. Information provided on the application states that the applicant was a resident of your Lodge jurisdiction during at least of portion of the past five years.

A copy of the application is enclosed in accordance with the requirements of Section 14.010 of the Laws of the Order. As further provided by 14.010, please appoint a special committee to advise *(Lodge Name and Number)* as to the character and fitness of *(Name of Applicant)* while a resident within the jurisdiction of your Lodge.

Thank you for providing the requested information in an expeditious manner.

Fraternally yours,

Lodge Secretary

Enclosure

Parts of Section 14.010 read:

“If, within five years from the date of an application, the applicant has resided within the jurisdiction of another Lodge, the applicant shall, on his application, give the names and addresses of at least two citizens residing in the jurisdiction of such Lodge. A copy of the application may be sent to said Lodge by the Secretary of the Lodge to which the application was made.

No vote shall be taken upon the application until the Membership Committee of the Lodge to which the application was referred has made a report and the report has been read in the Lodge referring the application.”

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME, NUMBER AND ADDRESS
(Lodge Letterhead)

Date _____

Name of Applicant _____

Address _____

City, State, ZIP _____

Dear (*Applicant's Name*),

In his letter acknowledging your application for membership in (*Lodge Name and Number*), Exalted Ruler (*Name*) indicated that you would be contacted to schedule a time for you to meet with the Lodge Investigation Committee. This letter is to notify you that the committee has reserved the following time and date for the meeting:

Time _____ Date _____

Location _____

If you have a schedule conflict please contact me at your earliest convenience so that a more convenient time can be arranged.

Please be advised that your sponsor has been invited to accompany you to the meeting. This is a normal Lodge procedure and has been found to help make the applicants for membership more relaxed during the interview. I look forward to assisting you should you have any questions as your application is considered by the Lodge.

Sincerely yours,

Lodge Secretary

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date _____

Name of Proposer _____

Address _____

City, State, ZIP _____

Dear (Proposer's Name):

This letter is to notify you that the Lodge Investigation Committee has reserved the following time and date for an interview of (Name of Applicant), whom you proposed for membership. The meeting is scheduled for:

Time _____ Date _____

Location _____

It is Lodge policy that the sponsor accompany the applicant to the interview. If you have any questions or schedule conflict, please contact me at your earliest convenience so that a more convenient time can be arranged.

Fraternally and Sincerely,

Lodge Secretary

**BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME, NUMBER AND ADDRESS**

Membership Committee's "Membership Interview Checklist"

Hello, (*Applicant's Name*), this interview is arranged so that we can ask you some questions which do not appear on your membership application. In addition, we will share some interesting facts concerning the Benevolent and Protective Order of Elks. Please feel free to ask questions at any time during the interview.

1. Review the answers to questions asked on the application. Note any differences in the information listed to that provided during the interview: _____

2. Were there any of these questions which were not clear to you or about which you have any questions? _____.
3. Many fraternal orders offer insurance or other benefits to their members. Do you understand that there are no such benefits offered through the Elks? _____ Are you aware that Elks are not permitted to use membership in the Order for business or commercial purposes? _____

It is recommended that the Membership Committee consider the following as an informational handout for new applicants to take home for future reference.

The objectives of the Order are fraternal, charitable, patriotic, and civic. Many of our programs are for the benefit of Youth. Most of our programs are based on the desire of Elks to help others who may be less fortunate. While there are a number of other charitable programs engaged in by every Lodge on a local level, the major statewide program is (*Describe*). In addition, the Elks nationally operate the Elks National Foundation. The income from this permanent trust fund is spent annually for scholarships for deserving young people in sponsoring the Elks National "Hoop Shoot®," in education awards to needy children of deceased Elks, and in aid to many State Association Projects such as ours. The programs for the aid of our Government, especially in times of war, have earned our Order the highest commendation from the Government. The destiny of our Order is tied directly to the destiny of our country and, therefore, our support of our Government and the advancement of Patriotism are of the utmost importance to us. Ours was the first organization to propose Flag Day and to get it adopted nationally. Our Order has pledged that "*So Long As There Are Veterans, The Benevolent and Protective Order Of Elks Will Never Forget Them.*" We have carried out this pledge and spent thousands of dollars and hours aiding our veterans, hospitalized or otherwise. These are some of the worthwhile programs in which we are engaged, and we hope that if you become a Member, you will want to assist us in this work.

4. We want you to know the qualifications for membership in our Order.

"No person shall be accepted as a Member of this Order unless a citizen of the United States of America, of good character, not under the age of twenty-one years, and a believer in God. No person shall be accepted as a Member of this Order who is directly or indirectly a member of or in any way connected or affiliated with the Communist Party, or who believes in or advocates the overthrow of our Government by force."

Do you subscribe to these membership requirements and agree to abide by them without reservation?

Membership Committee's "Interview Checklist"

Page 2

5. We are a patriotic Order and during our ritual at meetings, each member is directed to give the civilian salute to the Flag of our Country and to recite the Pledge of Allegiance. Do you have any reluctance about complying with this ritualistic requirement and do you agree to do so? _____.
6. What is your marital status? _____. How many dependent children do you have? _____.
Do your spouse and family encourage your seeking membership in our Order? _____.
7. We note you are a Citizen by Naturalization. As the Order of Elks is open to only Citizens of the United States, are you able to provide a copy of your final naturalization papers to the Secretary? _____.
8. In addition to the social and fraternal aspects of our Order, we are engaged in charitable, youth, patriotic, and civic programs. Are you willing to participate in these activities of the Lodge both financially and by active interest? _____. Do you feel that the total cost of initiation fee, dues, charitable and social participation will cause any hardship or handicap on you or your family? _____.
9. If application shows applicant to be a naturalized citizen, advise applicant that final citizenship papers must be presented to the Secretary and recorded.
10. Are you a member in good standing in all other clubs, organizations or Lodges of which you are a member?
_____ If not, which and why? _____
11. Please tell us about the social and civic activities in which are you presently engaged. _____

12. Do you have any hobbies? _____
13. Do you play any musical instrument, or are you interested in joining a singing group? _____
14. Is there anything about your application which we have discussed that you do not understand, or do you have any questions about the membership procedure or the Elks which you would like to ask us about?

Chairperson, Membership Committee

Date _____

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date

Name of Proposer
Address
City, State, ZIP

Dear *(Proposer's Name)*,

We appreciate the interest you have shown in the Lodge by proposing *(Name of Candidate)* for membership. So we may better assess the candidate's qualifications, we ask that you complete the accompanying Confidential Pre-Application Membership Proposal.

We also ask that you attend a pre-application meeting to discuss the proposal and help guide us in the decision-making on the prospective member's candidacy. The meeting will be held *(Time, date and place)*.

We're sure you agree that we should aspire to build a quality membership base. The pre-application will help in that process. Thank you again for helping make *(Lodge Name)* the best that it can be.

Fraternally yours,

Exalted Ruler

**BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER**

CONFIDENTIAL PRE-APPLICATION MEMBERSHIP PROPOSAL

BE VERY CAREFUL IN SUPPLYING THIS INFORMATION. THIS REPORT IS TO BE FILLED OUT WITHOUT THE KNOWLEDGE OF THE PROSPECT. REMEMBER THE QUALIFICATIONS FOR MEMBERSHIP ARE: Prospect must be a citizen of the United States, of good character, not under 21 years of age, and a believer in God, and cannot be directly nor indirectly a member or in any way connected or affiliated with the Communist Party, nor one who believes in or advocates the overthrow of our Government by force.

The following information is required from Proposer prior to issuing an official application blank for soliciting membership:

Prospect's Name _____ Occupation _____

Address _____ City _____ ZIP _____

1. How long have you known this prospect? _____ Age _____

2. How many years has prospect resided in the jurisdiction of this Lodge? _____

3. If less than five years, state previous residence(s). _____

4. Is prospect single? _____ Married? _____ Divorced? _____ # Dependent children _____

5. Employer's Name _____ Position _____

6. Is or has prospect ever been a Member of any Elks Lodge? _____ If answer is yes, give name of Lodge and present standing in it. _____

7. To what civic, social, or fraternal organizations does prospect belong? _____

8. What is prospect's community reputation? _____

9. What are prospect's habits regarding liquor? _____ Gambling? _____

10. As references, name four Members of *this Lodge* who know the prospect:

Name	Address	City, State	ZIP Code
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1.	_____		
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2.	_____		
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3.	_____		
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4.	_____		
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11. Remarks: _____

Proposer's Signature: _____ Membership #: _____ Date: _____

Address: _____ City, State: _____ ZIP Code: _____

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date

Name of Candidate
Address
City, State, ZIP

Dear *(Candidate's Name)*,

Congratulations, the members of *(Lodge Name and Number)* elected you to become a member upon initiation at its meeting held (DATE). We are pleased that you chose to join the Order of Elks and this Lodge. We trust that our association will be mutually pleasant and beneficial for many years term.

The Laws of the Order require that you attend an orientation session before you are initiated. The purpose of orientation is to provide an understanding of the purposes, programs and opportunities available because you are a member of the Order of Elks and this Lodge. Your *(Spouse/Significant other)* is invited and encouraged to accompany you so that she will become knowledgeable of the activities in which you might be involved and the opportunities for her your membership provides.

The session will be held at the Lodge *(Time and Date)*. The orientation program will be conducted after/ during *(Indicate type of event.)* Dress/attire is *(Indicate)*.

Your initiation is scheduled for *(Day and Date)*. Please arrive at the Lodge Secretary's office no later than *(Time)*. Be prepared to make payment of membership dues and fees in the amount of *(Indicate by category and total)*. Suggested dress for initiation is *(Indicate)*.

Should you have any questions concerning the orientation session or initiation or have a schedule conflict for either date, please contact the Lodge Secretary *(Name)* at *(Telephone Number and/or e-mail address)*.

Again, congratulations on being selected for membership in what is regarded as the finest fraternal order in the United States.

Fraternally yours,

Lodge Secretary

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date

Name of Proposer
Address
City, State, ZIP

Dear *(Proposer's Name)*,

It is my pleasure to inform you that Members of *(Name)* elected the applicant you sponsored to become a Member upon initiation at the meeting held *(DATE)*.

He/She is now a candidate of initiation. The Laws of the Order require that he/she attend an orientation session before being initiated. The purpose of orientation is to provide a more complete understanding of the purposes, programs and opportunities available to *him/her and Spouse/Significant other and family*.

The orientation session will be held at the Lodge *(Time and Date)*. The orientation program will be conducted after/during *(Indicate type of event.)* Dress/attire is *(Indicate)*. You and your *spouse/significant other* are encouraged to accompany your candidate so that *he/she* feels comfortable during the session and accompanying activities.

(Name of Candidate) is scheduled for initiation *(Day and Date)* and should arrive at the Lodge Secretary's office no later than *(Time)*. You are encouraged to escort the candidate to the Lodge, make introductions to the members present and further assist *(Name)* entrance into the Order and Lodge.

Accompanying your candidate to both occasions is an important step in activation of a new member and helps ensure *he/she* feels welcome, needed and appreciated, and becomes a long time member of the Order and this Lodge.

Fraternally yours,

Lodge Secretary

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date

Name of Candidate
Address
City, State, ZIP

Dear (*Candidate's Name*),

Our Lodge is extremely pleased to advise you that by vote taken at our meeting on (*DATE*), you were elected to become a Member upon initiation. We will be very proud to have you as a Member, and we hope that our association will be mutually pleasant and beneficial.

The Laws of our Order require that you attend an orientation meeting before you are initiated. This orientation meeting is important to your understanding of the purposes and programs of our Order and will be held at our Lodge at (*Time*) on (*Day, Date*). Your spouse is invited and encouraged to attend with you, as we feel it is equally important for both of you to know about the fraternity you are joining. We are sure that you will both find the orientation instructive and interesting.

Your initiation will take place at the Lodge on (*Day, Date*). Please appear at the Secretary's office not later than (*Time*), at which time it will be necessary for you to make payment of the fees and dues required. A questionnaire regarding your preference in committee assignments is enclosed. Please complete it and return it to the Secretary before your initiation.

We congratulate you on your upcoming membership in the finest fraternal order in these United States. If you have any questions, please contact our Secretary at (*Phone Number*).

Sincerely yours,

Exalted Ruler

Enclosures: Committee Questionnaire
RSVP Card

(See next page for suggested enclosure)

**BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER**

"New Member's Committee Preference List"

I would like to work on the following Committees:

	Yes	No
Band	_____	_____
Blood Bank	_____	_____
Billiard Room	_____	_____
Bowling Committee	_____	_____
Bulletin Board	_____	_____
Charity	_____	_____
Civic and Community Welfare	_____	_____
Civil Defense	_____	_____
Dance Committee	_____	_____
Decorating Committee	_____	_____
Drug Awareness Committee	_____	_____
Entertainment Committee	_____	_____
Flag Day Committee	_____	_____
Food Committee	_____	_____
Funeral Arrangements	_____	_____
Golf Committee	_____	_____
Greeters	_____	_____
"Hoop Shoot®"	_____	_____
Investigation	_____	_____
Lodge Activities	_____	_____
Membership Drawing	_____	_____
Membership and Stray Elks	_____	_____
Mothers Day Committee	_____	_____
National Convention	_____	_____
National Foundation	_____	_____
Orchestra	_____	_____
Photographs and Publicity	_____	_____
Picnic Committee	_____	_____
Retention	_____	_____
Sick Visitation	_____	_____
Soccer Committee	_____	_____
Sports Night	_____	_____
State Convention	_____	_____
State Major Project	_____	_____
Boy Scouts	_____	_____
Girl Scouts	_____	_____
Historian	_____	_____
Minor — Pee wee — Major Baseball	_____	_____
Youth Leadership	_____	_____
Explorer Club	_____	_____
Junior Bowling	_____	_____
Veterans Outings	_____	_____
Veterans Visitations	_____	_____

NAME _____

ADDRESS _____

PHONE NUMBER _____

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
LODGE NAME AND NUMBER
(Lodge Letterhead)

Date

Name of Proposer
Address
City, State, ZIP

Dear (*Proposer's Name*),

It is my pleasure to inform you that at the regular meeting of our Lodge on (*Day, Date*), your candidate (*Candidate's Name*) was elected to become a Member upon initiation.

Your candidate has been notified to appear at the orientation at our Lodge at (*Time*) on (*Day, Date*). We feel that this orientation is important to full understanding of the responsibilities and benefits of membership. Your candidate's spouse has been invited to attend this meeting, and we encourage you not only to urge them to come but also for you and your spouse to accompany them so as to make them feel at ease.

Your candidate has been notified to appear for initiation on (*Day, Date*), and should be at the Secretary's office no later than (*Time*). We hope you will escort your candidate to the Lodge, make introductions to the Members present and further assist your incoming Member's entrance into our Lodge.

These critical first impressions of the friendliness of our Lodge on these two occasions may well set the pattern for your candidate's future Lodge participation and enjoyment. This is a duty you as Sponsor owe to one who will soon be an Elk among us.

Sincerely and fraternally,

Exalted Ruler

Enclosure: (RSVP reply card)

