

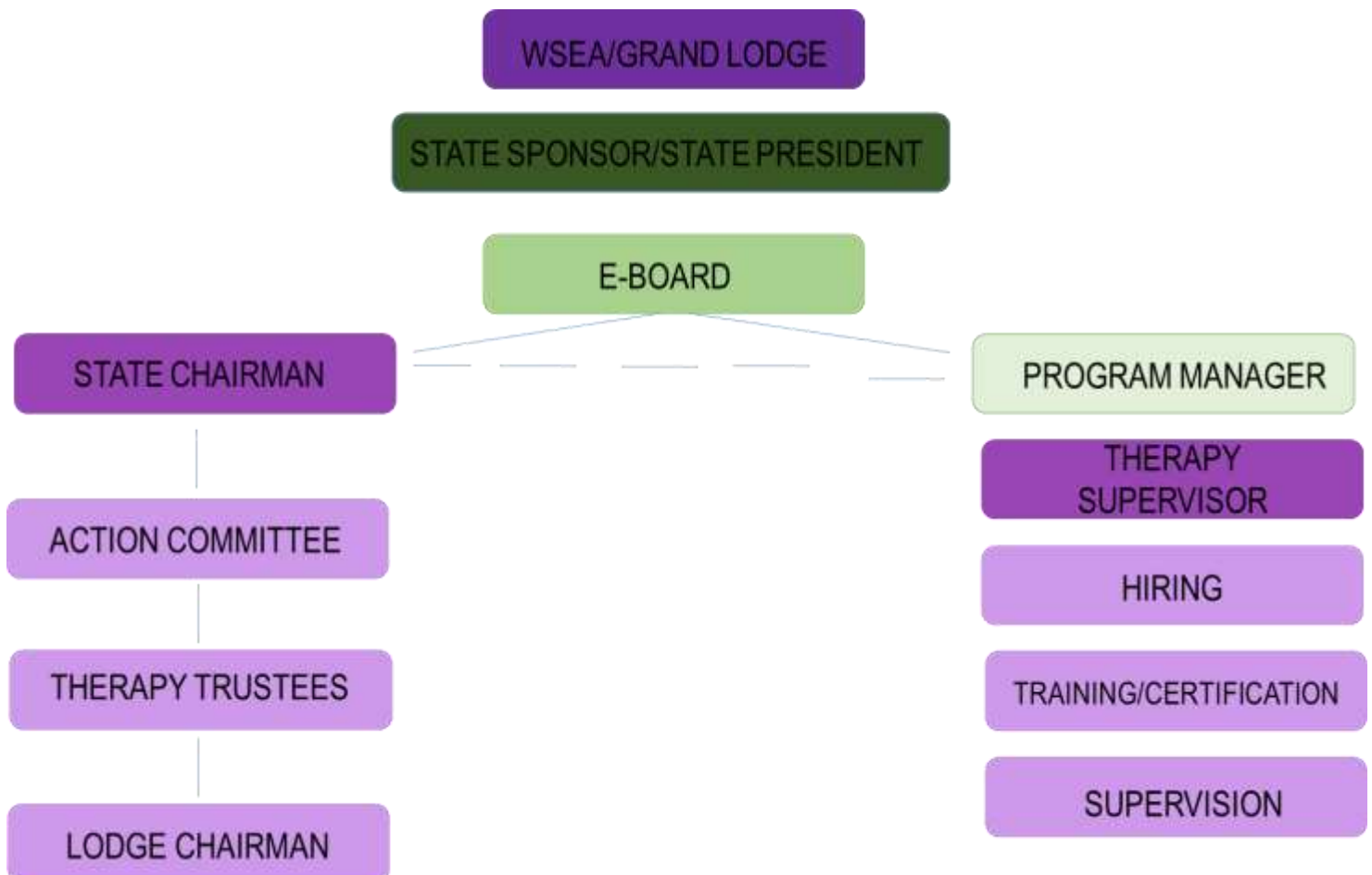


THERAPY TRUSTEE AND LODGE CHAIRMAN TRAINING MANUAL

HISTORY

The Washington Elks Therapy Program was conceived in 1954 as an outgrowth of the Bucks Program. (The purpose of the Bucks Program is to raise money for Children's Hospital & Regional Medical Center.) In 1954, there were many children who returned home from the hospital without the much-needed therapy to restore meaningful function to their lives. Washington Elks Therapy Program was started to fill this need. Its purpose was to provide home-based occupational and physical therapy to children in need of therapy. Most of the children seen in the early days were diagnosed with Cerebral Palsy. The Program was started with one mobile unit in the greater Yakima area. Today the Program has mobile units covering the entire state of Washington.

Program Oversight



STATE CHAIRMAN

- * Preside at all meetings of the Board of Trustees.
- * At the Mid Winter Session and at the Summer Convention of the Washington State Elks Association, submit a report showing the scope of the work performed under the direction of the Board of Trustees, the financial condition of the Therapy Program, and the condition of any tangible property owned.
- * Appoint an Interim Committee consisting of the Therapy Program Chairman, Treasurer, at least two members of the Board of Trustees and one member of the Board of Financial Trustees as agreed upon by the Financial Trustees and the Therapy Program Chairman of the Washington State Elks Association.
- * Call Special Meetings of the Board of Trustees of the Therapy Program.
- * Coordinate all publicity for the Therapy Program.
- * Encourage and assist in the preparation of articles for publication in the Elks Magazine and Lodge Bulletins.
- * Use whatever means available to inform the membership and the public of the accomplishments of the Therapy Program.

THERAPY ACTION COMMITTEE

- * Meet at regular intervals with the Secretary/Manager.
- * Review the activities, financial status, scope and work of the Therapy Program, budgeted expenditures and determine if policies established by the Board of Trustees are being carried out.
- * Report to the Board of Trustees at each regular or special meeting of the Board

APPENDIX A

The Story of the Therapy Program

(Revised 1/2013)

Washington State Elks Association
MANUAL TITLE:
WASHINGTON ELKS THERAPY PROGRAM
FOR CHILDREN, INC

Revised 9/2013

1.0 PURPOSE To provide Occupational and/or Physical Therapy services in a home environment at no cost to the families of children from birth to twenty-one years of age with developmental or physical disabilities.

2.0 SCOPE Applies to children who are medically fragile or who would otherwise go without services because of health status, transportation problems or lack of other resources who would experience further deterioration in their status. Preference is given to infants and young children.

3.0 COMPOSITION

The Washington Elks Therapy Program for Children, Inc. is the "Major Project" of the Washington State Elks Association. The Major Project Committee consists of the Board of Trustees of the Washington Elks Therapy Program for Children, Inc.

4.0 RESPONSIBILITIES

4.1 President

- * Appoint a member of the Therapy Board of Trustees as Chairman for a one-year period.
- * Appoint members to the Board of Trustees for a five-year term.
- * Appoint one member of the Board of Financial Trustees of the Washington State Elks Association to serve on the Therapy Program Interim Committee as recommended by the Financial Trustees.
- * Remove a member of the Major Project Committee (Therapy Board of Trustees) upon concurrence of two-thirds of the members of the Executive Committee of the Washington State Elks Association.
- * Call Special Meetings of the Board of Trustees of the Therapy Program.

4.1 State Association Vice Presidents

* All Vice Presidents of the Washington State Elks Association are non-voting ex-officio members of the Board of Trustees of the Therapy Program.

4.2 Therapy Program Chairman

- * Preside at all meetings of the Board of Trustees.
- * At the Mid Winter Session and at the Summer Convention of the Washington State Elks Association, submit a report showing the scope of the work performed under the direction of the Board of Trustees, the financial condition of the Therapy Program, and the condition of any tangible property owned.
- * Appoint an Action Committee consisting of the Therapy Program Chairman, Treasurer, at least two members of the Board of Trustees and one member of the Board of Financial Trustees as agreed upon by the Financial Trustees and the Therapy Program Chairman of the Washington State Elks Association.

- * Call Special Meetings of the Board of Trustees of the Therapy Program.
- * Coordinate all publicity for the Therapy Program.
- * Encourage and assist in the preparation of articles for publication in the Elks Magazine and Lodge Bulletins.
- * Use whatever means available to inform the membership and the public of the accomplishments of the Therapy Program.

4.3 Board of Trustees

- * Administer and manage the business of the Therapy Program in accordance with the Constitution and By-Laws of the Washington State Elks Association.
- * Approve the appointments by the Chairman to the Therapy Program Action Committee.
- * A majority of the Trustees may call Special Meetings of the Board of Trustees of the Therapy Program.
 - Attend four regular meetings of the Therapy Program and Special meetings when called by proper authority.
- * Act as the Liaison Officer for two or more Lodges within their district.
- * Promote and encourage fundraising activities for the Therapy Program within the Lodges assigned.
- * Report to the Therapy Program on visits to your Lodges using Therapy Lodge Visitation Report (Appendix C).
- * Become familiar with the Tall Elk and Tall Lady Chairperson within the Lodges assigned.
- * Assist the Lodges assigned in promoting the Therapy Program.
- * Monitor the level of participation and contributions of the Lodges assigned.
- * Promote the use of Memorial and Honor Gift Envelopes.
- * Monitor the monthly reports and provide encouragement to Lodges not fully utilizing Living Tribute Gifts.
- * Encourage the membership to consider using wills as a means of supporting the Therapy Program.
- * Assist the Lodge Bequeaths Chairmen in establishing a Lodge Program.
- * Monitor any bequests to the Therapy Program.

4.4 Therapy Program Action Committee

- * Meet at regular intervals with the Secretary/Manager.
- * Review the activities, financial status, scope and work of the Therapy Program, budgeted expenditures and determine if policies established by the Board of Trustees are being carried out.
 - Report to the Board of Trustees at each regular or special meeting of the Board.

4.5 Secretary/Manager

- * Issue notices and have charge of the records of the Therapy Program.
- * Keep minutes of all meetings held by the Board of Trustees.
- * Have charge of all books, papers and seal of the Therapy Program.
- * Attest with their signature and impress with the Therapy Program seal all documents required to be executed by the Therapy Program.
- * Perform all such other duties as are indicated by their office.

4.6 Spring Fundraiser Chairman

- * Establish a prize schedule each year.
- * Review rules and tickets to insure it is ready for printing by about May 1st.
- * Insure all tickets are received about one week before the convention.
- * Take the drawing drum complete with tickets to the Summer Convention and have drawn during the open session.
- * Notify all winners and have prizes forwarded to them.

4.7 Therapy Budget Committee Chairman

- * Prepare a budget for the Therapy Program for presentation to the Board of Trustees at their April Meeting.
- * Monitor the progress of the budget and report on a monthly basis.
- * Make recommendations for budget revisions at each quarterly meeting.

4.8 Investment Committee Chairman

- * Monitor the investments of the Therapy Program.
- * Make recommendations to the Board of Trustees regarding investment changes.
- * Report to the Board of Trustees on a quarterly basis.

4.9 Medical Advisory Board

- * The Medical Advisory Board will advise the Washington Elks Therapy Program for Children, Inc. on issues related to the delivery of therapy services to infants and children with special needs and the training and advice offered to their families.
- * Evaluate the medical performance yearly from reports of treatments from the Therapy Supervisor, letters or comments from parents and possible reports provided by hospitals or learning institutions.
- * Evaluate any future needs for proper advertising, methods, new medical practices and possible state or federal changes which may effect treatment of children within the Elks Therapy Program.
- * Perform tasks which may provide information needed for better performance of the Elks Therapy Program.
- * Attend an annual meeting of the Medical Advisory Board or provide information to the meeting.

4.10 Lodge Tall Elk Chairman/Ladies Organization Tall Lady Chairman

- * Evoke donations from the membership and other interested parties.
- * Receipt donations received at the Lodge/Organization level and transmit them to the State Office on a MONTHLY basis.
- * Promote the Therapy Program on a continuing basis through the Lodge/Organization meetings and publications.
- * Conduct at least two special fundraising events within the organization each year in order to achieve desirable per capita goals.
- * Arrange for a Therapy Demonstration for the organization through the Therapy Trustee assigned following the procedures listed in Appendix H.
- * Become familiar with the various types of giving to the Therapy Program - Tall Elk, Tall Lady, Coin Boxes, etc.
- * Track donations by individuals of their respective organization.
- * Promote donations to the Therapy Program through the use of Honor Gifts and Living Tribute Envelopes
- * Ensure the Lodge provides a Memorial Book to the surviving members of a deceased Elks family.
- * Promote donations to the Therapy Program through bequeaths.
- * Be familiar with the various types of bequeaths which can be made.

5.0 REFERENCES

5.1 State Association Constitution and By-Laws

5.2 Therapy Program By-Laws

6.0 APPENDIX

Appendix A - The Story of the Therapy Program (Revised 1/2013)

The Story of the Therapy Program -How it all Began

Frequently Asked Questions

Appendix B - Services Offered (Revised 1/2007)

Appendix C - Therapy Trustee's Duties (Detail) (Revised 1/2007)

Appendix D - Tall Elks/Tall Lady Chairman Duties (Detail) (Revised 1/2013)

Appendix E - Living Tribute Chairman Duties (Detail) (Revised 1/2012)

Appendix F - Bequeaths Chairman Duties (Detail) (Revised 6/2014)

Appendix G - Therapy Program Workshop Agenda (Revised 6/2014)

Appendix H - Therapist Visitations (Revised 1/2013)

Appendix I - Reasons for Giving (Revised 1/2007)

Appendix J - Coin Box Program (Revised 6/2014)

Appendix K - Reports (Revised 6/2014)

Appendix L - Awards (Revised 1/2007)

Appendix M - Supplies (Revised 1/2007)

Appendix N - Therapy Program By-Laws (Revised 11/2011)

Appendix O - Trust Fund Policy (Revised 1/2013)

The Story of the Therapy Program

We live in a society where government, life insurance companies and group health plans play a huge part in the health status of the American people. There are, however, areas of human suffering where these entities fail to meet the needs of some children and their families.

For them the dream of health and happiness is circumscribed by poverty, accidents, or circumstances over which they have no control.

For them there is no dollar to meet the dream of health and happiness for which we all long.

To bring the dollar and the dream together for these children, the Washington State Elks in 1954 adopted as their Major Project, the Washington Elks Therapy Program for Children. The Elks incorporated it and have supported it with generous contributions, bringing desperately needed therapy services to hundreds of children throughout the State.

Under the Articles of Incorporation, the purposes for which the Program was formed are:

"To raise, receive or accept funds for assisting and aiding in the treatment and rehabilitation of children suffering from cerebral palsy, and for other physically handicapped children, to raise and expend money for education purposes, for establishment of mobile units, staffs of trained therapists, for the treatment and help of children suffering from cerebral palsy, and other physically handicapped children, and for maintaining and assisting in scientific medical research to ascertain the causes of cerebral palsy, and to any and all persons, both with the specific provisions that none of the funds raised shall inure to the private profit of any individual person or persons. To distribute such funds, subject to the provisions of Section 2 of Article XI of the Constitution of the Washington State Elks Association in such amounts and proportions as may from time to time be determined upon by the corporate Board of Trustees, and to raise, receive or accept funds for caring on such charitable activities, either through the Washington Elks Association and/or its members, or from other organizations or individuals, and to do any and all things incidental thereto or necessary, expedient, useful or desirable in connection therewith including the entering into contracts, which this Corporation may lawfully do in furtherance of any or all of such purposes".

The most appealing features of this Program that led to its support by the Elks were that:

- the child with special needs could be treated in their own home or community setting.
- the parents could be trained to assist in the therapy.
- large hospital and medical expenses are eliminated for the family.
- no permanent or costly facilities are required.

From a modest beginning when the first mobile therapy unit was displayed at the 1954 Yakima Elks Convention, the Program has had a substantial growth each year.

Treatment of children with cerebral palsy and other physical disabilities cannot be restricted to the attention of only one profession due to the multiple disabilities of these children. Successful treatment demands the attention of persons possessing many different kinds of training. We must, therefore, point out that the Elks Therapist, working alone in the field, must rely on prescriptions of the physician and must observe and report the actions of the child back to the physician so that further treatment, if necessary, may be prescribed.

The Physical Therapists and Occupational Therapists in the Elks Program, in and of themselves, are especially skilled at providing therapy services to children. Tolerance, patience, kindness, plus parental cooperation are necessary requisites

in the successful treatment of the child with special needs.

Physical and Occupational Therapy does improve the physical condition of a child with special needs and, in many instances, assists them in becoming wholly independent of aid from others to feed, clothe, ambulate and help themselves. Were it not for the Washington Elks Therapy Program, many hundreds of young people who are walking today would not be doing so. In every playground where children gather, there are several young people who would not be there if it were not for the Elks Therapy Program for Children. "Miracles are wrought by God, who sometimes guides the hand of man to make wondrous things come true."

A number of clients receiving this free therapy could not afford the treatment on the open medical-care market if the Elks Program did not exist.

The Washington Elks Therapy Program for Children, Inc., a non-profit corporation of the Washington State Elks Association, employs Occupational or Physical Therapists, all graduates and licensed therapists who are dedicated to their profession. Providing therapy for children in their homes requires our therapists to travel through the most hazardous of weather and road conditions along with the inconvenience of working without equipment normally found in a clinical environment.

At the present time, each therapist, Physical or Occupational, travels approximately 2,000 miles per month, administering treatments to their respective clients. Therapy, regardless of the type, needs to be repetitive. The uniqueness of this Program is that the therapist interprets the physician's prescription for therapy, treats the patient on scheduled visits, and teaches the parents to carry out the prescribed treatment on a daily basis between the therapist's visits. The parents then carry on with the daily routine of exercise and muscle stimulation that is so necessary and vital for the Program to be successful. The therapist, on the next of succeeding visits, instructs the parents in other exercises, etc. Both, or rather all three parties, working together (the therapist, parents, and the child) can eventually succeed in making it possible for the child to increase their independence, enhance their development and become a contributing member of society.

The children receiving care under the Program have problems resulting from a variety of causes, some of which include cerebral palsy, muscular dystrophy, pre-term infants, birth defects, and others. The only requirement established by the Program is that it is restricted to children with disabilities under twenty-one (21) years of age. Each client must have a prescription from his or her physician. Treatment is not restricted to children of Elks, nor is any treatment denied to a client because of race, color, creed, or national origin. There is no charge made to the families of the children receiving the services of the Program. In fact, the parents of those children referred for treatment are never asked if they can afford to pay for the service, however, the therapists are extremely careful to avoid the duplication of available services.

Financing is the greatest problem of the Program, not because the Elks are not generous people, for they surely are. Given the large population of Elks in the State of Washington, reaching each of them with information about the Program is multiplied many times due to the fact that they are not concentrated in any one particular area. There are Elks Lodges all over the State of Washington that are members of the Washington State Elks Association and are participating in the Therapy Program.

Support is derived from the per capita of the member Lodges of the State Association. This provides \$1.25 per member for the operation of the Program. With the annual budget, the per capita does not provide the substantial percentage of the needed income. The balance is raised in various ways such as Special Events - which include Coin Boxes, Elks sponsored golf tournaments, bequeaths, memorials, return on invested trust funds, and donations from those identified as a "Tall Elk or Tall Lady".

The Tall Elks and Tall Ladies, who are members of the Order, and their spouses, as well as Friends of the Program, are motivated to make further contributions to the Therapy Program. A "Tall Elk" makes a personal contribution of at least \$10

per year. After \$50 in contributions, he/she is a "Silver Member"; after \$100 in contributions, he/she is a "Gold Member"; contributions totaling \$500 makes them an "Emerald Member"; and when they reach a total giving of \$1,000, they become "Diamond Members". Emerald and Diamond members receive a card and pin in recognition of their support. For additional levels of contribution recognition, see Appendix L. Donations of \$500 and less go directly toward the current year operating expenses. Contributions of more than \$500 are placed in a permanent Trust Fund and invested to produce interest income. The earnings from these investments are used for the daily operation of the Therapy Program, and the Trust Fund remains intact. The many Emblem Clubs and Ladies of Elks are contributing generously to the Program which greatly assists in meeting the annual budget.

These Mobile Units collectively average over 2,000 miles a month covering the State for the Program, which is administered by the Therapist Supervisor.

The Therapy Program Trustees, consisting of three per district, and the Chairman are appointed by the President of the Washington State Elks Association and have general custody of the Program. They are required to meet not less than four (4) times a year. An Executive Interim Committee, selected among the Board, meets monthly. The Trustees are responsible for the management, investment and disbursement of all funds designated for the Therapy Program. Each Trustee is responsible for the Washington Elks Therapy Program activities in at least two Lodges in their District. There is no compensation for their services. Through their enthusiasm, dedication, and willingness to sacrifice their time, children with special needs are given a better opportunity in their lives.

How it all Began

This is the story of how our Major Project, the Washington Elks Therapy Program for Children, Inc. and, incidentally, the Seattle Children's Hospital and Regional Medical Center came into being. It also outlines the importance of supporting and perpetuating these very important, worthwhile programs.

Working with handicapped children, as they were then known, the fraternal activity began in 1915. A small hospital with a capacity of 20 beds and two small cottages converted to suit hospital needs, was opened in Atlanta, Georgia, by the Scottish Rite Masons of that City. As a result of the work accomplished at the Atlanta Hospital, the Shriners in 1920 in Portland, Oregon, undertook a similar program. Two years later the Elks Lodges in New Jersey initiated a program for special needs children and very quickly the Elks Lodges in New York and Pennsylvania began similar programs. In July of 1924, the Washington State Elks Association initiated a similar program. Today Elks Lodges through their State Associations have similar programs. It is a nice feeling to know that in Washington, we're one of the first. Since our inception other states have modeled programs after ours.

Many years before fraternal work with special needs children had begun, a group of women founded the Children's Orthopedic Hospital in Washington State. They began with 1 bed in a local ward and increased that number to 6 before they were able to open a 12-bed fresh air house. A few years later, in 1921, this facility had grown to a 4-story building providing 128 beds, and this had already proven to be inadequate.

The program undertaken by the Washington Elks was called "BUCKS". That name was derived from the official name as incorporated by the Elks, "Birthday Utopian Crippled Kiddies Service". The first letter of each of the words in the corporate title spelled "BUCKS". That humble beginning by the Orthopedic Hospital in 1907 has grown to be an institution with national recognition, and all during those years, the Elks have played a vital part. When our current program, the Elks Therapy Program for Children, was incorporated in 1954, it expanded considerably on anything we had been doing prior to that time and since has grown to a nationally recognized program. Our Program is primarily funded by contributions from Elks that are members of the Washington State Elks Association.

FREQUENTLY ASKED QUESTIONS:

1. How many children are being treated?

The number of children being treated is, to some degree, a factor of the number of therapists our budget permits us to place in the field. Each Therapist has an average caseload of 25 children most of the time. It must be recognized that these children are dispersed throughout the State, many far remote from central facilities. This results in substantial travel, in many instances, in order to treat a child.

2. What percent of my contribution is used for treatment compared to the administrative cost of the Program?

We are very proud of the fact that the percentage of the contributed dollar utilized for treatment as opposed to promotion, publicity, and administration is as high or higher than any other charitable program we are aware of in the U.S.

This is, to a large degree, the result of the volunteer effort by many people within the state in raising funds and administering the Program. Were we forced to pay for this type of talent and services, we would not be able to allocate such a substantial amount to the prime purpose of the Program. Our most recent statistics indicate that approximately 90% of every dollar is used to provide the care and treatment of children in the Program. This compares to a national average of approximately 50-60% of every dollar and some as low as 30% for every dollar contributed.

3. If I want to provide for the Program in my will, what should I do?

Special explanatory leaflets have been prepared to acquaint attorneys with the Project and encourage them to recommend to their clients this worthy program as a beneficiary when preparing a will. There are many ways the Therapy Program can be designated to receive money or property from an estate:

- a. Outright bequeaths. This is the simplest means of an estate tax charitable deduction.
 - b. Residuary bequeaths. When provisions have been made for one's family and others, a portion of the estate remains unassigned
 - c. Codicil. If a will has already been prepared and is up-to-date, a charitable bequeath, if it is not now included, may be provided through the addition of a codicil to the will. This should be prepared by an attorney.
 - d. Annuity or life income by will. There is a choice of arrangements that can be created by a will to provide an annuity for life income to one's beneficiary with the remainder going to the project.
- All of these plans provide an allowable estate tax deduction for the value of the gift. The leaflets referred to above are available through the Lodge committeeman responsible for this portion of the Program.

4. What is the significance of the Therapy Program Trust Fund?

A number of years ago, the Board of the Therapy Program, by resolution, established Trust Funds. Its purpose is to receive contributions which in perpetuity will continue to produce income to support the Program. In the Tall Elks Program, any single contribution of more than \$500 is allocated to the Trust Fund, and only the interest derived from that fund can be used for the operation of the Program. Thus, a contribution of more than \$500 will continue year after year to produce a contribution to the Project. Additionally, any donations received from Memorial Envelopes or Honor Envelopes as well as bequests are added to the Trust.

5. How are the Trust Funds invested?

An Investment Committee from within the Board of Trustees of the Project administers the trust funds. They, in addition, receive advice and counsel from the Union Bank. The funds are invested in a broad spectrum of investments. These include seasoned mortgages and contracts, commercial paper, bank notes, government bonds and other high yield forms of investment.

APPENDIX B

Services Offered

(Revised 1/2007)

SERVICES OFFERED

HISTORY

The Washington Elks Therapy Program was conceived in 1954 as an outgrowth of the Bucks Program. (The purpose of the Bucks Program is to raise money for Children's Hospital & Regional Medical Center.) In 1954, there were many children who returned home from the hospital without the much-needed therapy to restore meaningful function to their lives. Washington Elks Therapy Program was started to fill this need. Its purpose was to provide home-based occupational and physical therapy to children in need of therapy. Most of the children seen in the early days were diagnosed with Cerebral Palsy. The Program was started with one mobile unit in the greater Yakima area. Today the Program has mobile units covering the entire state of Washington.

Besides growing in size, the Program has changed in other ways. With the growth of services to disabled children, especially in the 70's, the role of Washington Elks Therapy Program has shifted to focus on the children who do not have access to services due to lack of transportation, inability to pay, or the child's fragile condition requiring that services be provided in the home. The Program has always served children birth to 21. Most of the children in our Program today are under 6 years but we do have some school age children and teens. Our health care and medical abilities are allowing more children than ever before to survive traumatic births and other childhood diseases and accidents. Now, over 50 years from its beginning, the Washington Elks Therapy Program continues to be a vital and highly respected therapy service in Washington. Currently we are serving infants and children with a variety of challenges including: physical impairments, neurological impairments, sensory dysfunction, genetic disorders, drug/alcohol exposure, trauma and other chronic health conditions like cancer, heart defects, and respiratory conditions.

THE REFERRAL PROCESS

Children in need of Occupational or Physical therapy can be referred to the Program by anyone familiar with the child's need. The referral is called in to the State Office or to the local Occupational or Physical Therapy unit in which the child resides. The therapist then contacts the family to determine the child's needs. Selection is made by the therapist based on the therapist's present caseload and need of the child as stated in our mission statement. The statement reads - "Often the families are referred to other resources present in their community of which the family was unaware. If the child is accepted, a doctor's prescription for OT or PT is required before service can start".

Ninety-nine percent of the caseload is seen in the home with the parent/guardian present. A few children are seen at an alternate site like a day care center. Our therapists do consult with other programs involved with the child, but do not treat children at those sites.

INITIAL CONTACT WITH FAMILY

The therapists arrange a time for a home visit. At the home visit the therapist fills out a face sheet, gets parent/guardian signature for permission to treat the child, takes a history on the child and explains the program to the parent/guardian. A regular weekly home visit is then established, usually once a week. Parents are required to be present so they can carry over the treatment during the week.

SERVICES PROVIDED

The Washington Elks Therapy Program staff is either an Occupational or Physical Therapist licensed to practice by the **State of Washington. All have at least a Bachelor's Degree in Occupational or Physical Therapy and some have Master's Degrees. As of 2007, entry level for Occupational or Physical Therapists requires a Master's Degree.** Therapists provide two kinds of therapy services:

1. Direct Therapy - direct, evaluation, assessment, and hands on treatment of the child using standard OT or PT treatment techniques.
2. Indirect Therapy - includes activities to coordinate the direct treatment program with others involved with the child, fabricating adaptive equipment, making splints, attending medical examinations with the child when the presence of the therapist would be helpful to the overall treatment plan.

LENGTH OF SERVICE

Children are seen until the therapy goals have been met and/or the child's needs can best be met in another program. Much time and effort on the part of the therapist is necessary to make this process a smooth transition for the child and the family.

ADMINISTRATIVE RESPONSIBILITIES OF THE THERAPIST

All units are required to submit a monthly report of their activities and an expense account which are reviewed by the supervising therapist and Program Manager. The therapists are required to attend a Fall and Spring conference each year to participate in staff meetings and continuing education.

CLINICAL RESPONSIBILITIES

Therapists are required to document each visit in the chart, to prepare an initial evaluation, a progress note every 6 months, and a discharge summary upon discharge of the child.

Trustees are encouraged to get to know the therapist in their region and to ride with them to see first-hand what they do. These rides can be arranged directly with the therapist on a mutually acceptable day. In general, visits to the program are kept to a minimum so as to minimize treatment disruption.

A few units offer group therapy sessions with a specific focus, like swimming, activities of daily living, or feeding.

GLOSSARY OF THERAPY TERMS - SOME TERMS YOU MAY HEAR

1. OT - Occupational Therapy
2. PT - Physical Therapy
3. SI - Sensory Integration
4. Screening - a quick assessment tool used to identify children who need further evaluation.
5. Standardized Testing - the use of standardized test tools to assess the functional level of children compared to their peers. Washington Elks Therapy Program uses: the Bayley, Peabody Developmental Motor Scales, Bruininks Oseretsky.
6. NDT - neurodevelopmental treatment, a treatment technique developed by Karl and Berta Bobath which attempts to help the child develop normal motor sequences and normalize tone.
7. Muscle Tone - the quality of muscle resistance when muscle is gently squeezed. Ranging from hypotonic - very mushy to hypertonic - very stiff with "normal" being somewhere in the middle.
8. Therapy Ball - a large ball used by many therapists to implement NDT techniques and to promote strength and balance reactions.
9. Orthotics – splints/braces usually made of plastic for feet or hands to improve function, maintain range of motion, or prevent deformities.

APPENDIX C

Therapy Trustees (Detail)

(Revised 1/2007)

THERAPY TRUSTEES' DUTIES

You have been selected to serve as a Trustee of the Washington Elks Therapy Program for Children, Inc. - our Major Project. As such, you will play a key role in its success and growth but only if you perform as is expected of you. These guidelines are set down in the interest of the Program to acquaint you with the expectations of your performance for as long as you serve on this Project. It is important that you are able to log on to the WSEA website for training information and how to order supplies for your lodges.

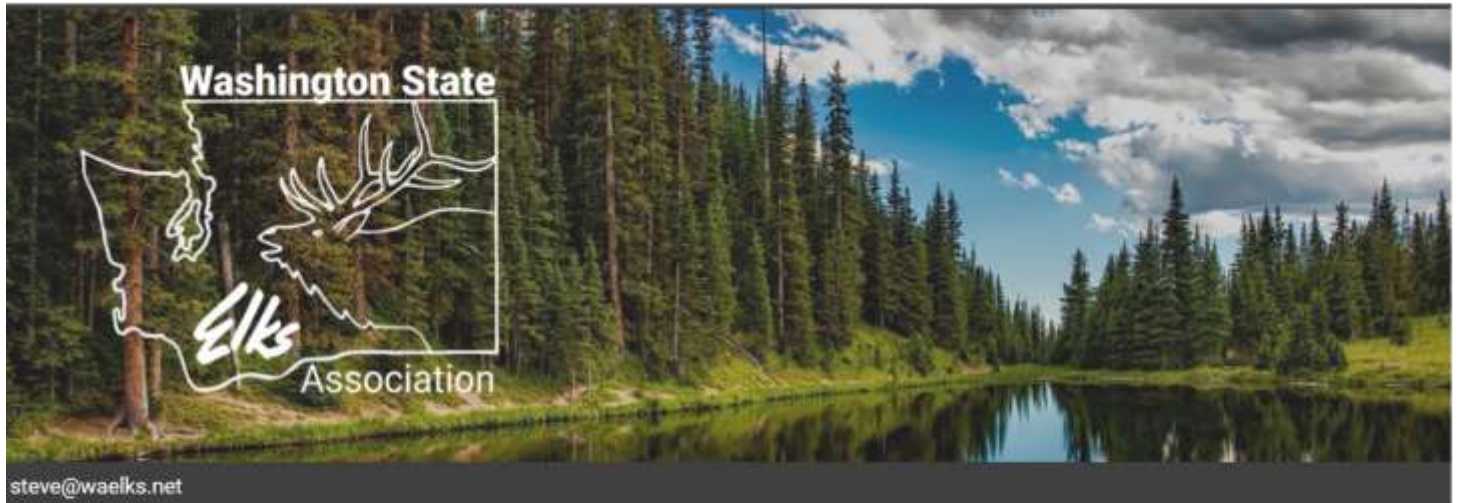
1. As a Trustee, you are expected and obligated to attend each meeting of the Therapy Program Trustees. Four regular meetings are scheduled each year. One is conducted at each of the conventions of the Washington State Elks Association, and one is conducted at each of the Spring and Fall Quarterly Meetings. These meetings will be attended at your expense.
2. You will assume the responsibility as a liaison officer responsible for two or more Lodges in your district. It will be your duty to acquaint yourself with your Lodge's Chairmen assigned to promote the Program within their Lodge. Their specific responsibilities are described in Appendixes D through F of this Manual. Report your visits to your Lodges using the Therapy Lodge Visitation Report which is part of this Appendix to the Therapy Program Chairman. This form is available on the WSEA website under resources. It is called Therapy visitation form.
3. You will familiarize yourself thoroughly with the history, background, developments, aims and all details of the Program so you will be ready at all times to advise and assist the Lodge Chairmen, Lodge Officers, Elk members, Elk Lady's groups, and the public.
4. In those Lodges assigned to you, you will clarify the roles of the Lodge Chairmen and Lady's groups, and identify the specific responsibilities associated with this assignment. The principal areas of responsibility are:
 - a. Tall Elks and Tall Lady Program
 - b. Living Tribute Envelope Program
 - c. Bequeaths, Wills and Codicils
 - d. Special Fund Raising Programs to achieve their per capita goals
 - e. Demonstrations
 - f. News Articles - Lodge Bulletins and Local Media
5. You will familiarize yourself with the financial status of the Program, the level of participation and contributions by the Lodges and the monthly Financial Report. You will receive a copy of the monthly Financial Report which includes information on giving for each Lodge. Reports are detailed in Appendix K.
6. Trustees are responsible for and should make sure that individual and Lodge contributions for the Project are forwarded to the State Office at least on a monthly basis.
7. You will familiarize yourself with the activities of the Lodges within your jurisdiction. Keep yourself advised of the Lodge's participation in the Program. Be ready to assist whenever requested or volunteer assistance is requested.
8. In your liaison with the Lodges and Lodge Committeemen, you should impress upon them the desirability of establishing excellent public relations and the utilization of local news media such as Lodge Bulletins, newspapers, radio and television. Make sure that the Lodge Committeemen are furnished with newsworthy items so that they, in turn, can relay them to the news media.

9. Establish and maintain liaison between the therapist operating in his/her area and the Lodges in his/her area. Encourage, assist, plan and arrange for personal appearances of the therapists at Lodge meetings or open meetings in order that the members of the Elks and the public are fully advised of the program (see Appendix H on the Scheduling and Conduct of a Demonstration).

10. Become personally acquainted with those Elks in your area who are enthusiastic supporters of the Program and assist in their training and indoctrination.

In summary, no other activity deserves and requires more dedicated efforts than this Program. No greater honor can be bestowed on an Elk in the State of Washington than being selected to serve as a Trustee of our "Major Project". In his/her care and custody is our most important single activity. This responsibility cannot be taken lightly since the future of the Project and its necessary growth are dependent upon the leadership and dedicated efforts of the Trustees.

The Therapy Trustee visitation report is available on the WSEA website.



<https://waelks.org/resources/therapy-trustees-visitation-report/>

Therapy Trustees Visitation Report

Send a visitation report to your district's Vice President using the form below.

Washington Elks Therapy Program for Children

[Therapy Trustees Visitation](#) .

Trustees Name:

District:

Lodge Visited: Click or tap here to enter text.

Date of visit: Click or tap here to enter text.

Lodge representatives Present:

Is the lodge following the guidelines for:

Submission of donations: ☐Yes ☐No

Coin Box Events: ☐Yes ☐No

Tall Elks: ☐Yes ☐No

Bequeaths: ☐Yes ☐No

Living Tribute Memorials ☐Yes ☐No

Honor Gifts ☐Yes ☐No

Comments: Click or tap here to enter text.

Is information on the Therapy program included in the lodge bulletin? ☐Yes ☐No

Is the lodge planning a therapy demonstration? ☐Yes ☐No

Is the lodge planning a special fund raising event or coin box dinner? ☐Yes ☐No

What was discussed during the visitation: Click or tap here to enter text.

TRAVEL AND TIME REPORT

Distance traveled for visitation: _____miles round trip

Time spent at the lodge for visitation: _____minutes

Travel time: minutes round trip_____

When you visit a lodge you can be expected to answer questions about supplies. This is a supply order form which is in the Therapy program manual found on the WSEA Therapy Program page.

Washington Elks Therapy Program for Children, Inc.

SUPPLY REQUEST (Indicate Quantity)

Tall Elk Receipt Books: _____ Tall Lady Receipt Books: _____

Tall Elk Pins: _____ Tall Lady Pins: _____

BROCHURES - Therapy: _____ Wills: _____

LIVING TRIBUTE ENVELOPES - Memorial: _____ Honor: _____

Memorial Books: _____ Coin Boxes: _____

Ship to - Name: _____

Street Address: _____

City: _____ St: _____ ZIP: _____

Appendix C

APPENDIX D

Tall Elk/Tall Lady Lodge Chairman (Revised 1/2013)

TALL ELK/TALL LADY CHAIRPERSON DUTIES (Detail)

RESPONSIBILITY

The prime responsibility of the Lodge Tall Elk Chairman is to evoke donations from the members and any other interested party to support the Washington Elks Therapy Program for Children, Inc. It is also his responsibility to keep track of the gifts received. To aid in the accomplishment of these responsibilities, Giving Levels have been established to recognize support to the Program. They are listed in Appendix L. Additionally, supplies are provided free of charge from the State Office and are listed on Appendix M. Donations made to the Washington Elks Therapy Program for Children, Inc. are tax deductible.

RECEIPTS & TRANSMITTALS

As donations are received, it is the Tall Elk Chairman's responsibility to account for and transmit the funds to the State Office at least once a month. ALL funds received must be placed in a Lodge Restricted Account awaiting transmittal to the State Office.

Donations received directly at a Lodge Office do NOT have to be sent to the State Office with a Tall Elk Receipt but the Lodge is responsible to provide the donor with some type of receipt. Individual receipts will be sent from the State Office. The State Office will accept donations with any documentation that provides sufficient information as to who made the donation (name & member #), address and the reason for the donation (Tall Elks, Tall Ladies, Coin Boxes, etc.). The exact form can be developed by the Lodge. The EXCEPTION to this policy is Living Tribute Gifts (Memorials and Honor Gifts). These REQUIRE the use of Memorial or Honor Envelopes.

The Tall Elk Receipt Book may be used to provide a receipt for the donor and a form for the transmittal of funds to the State Office. A carbon copy remains for the Lodge records. All funds forwarded to the State Office should be accompanied by receipts equaling the total of the check submitted. Funds received on Lodge checks without receipt forms will be credited to the Lodge account.

RECORDS

Lodge records may be prepared in any manner which allows for the accumulation of the total amount of donations made by Lodge members and those associated with the Lodge. Some Lodges use an alphabetic card file for Tall Elk and Tall Lady donations. These cards reflect all contributions to date, change of address, and when silver, gold, emerald and diamond awards are received. Another method, which is effective, is the marking of a copy of the current Gift Acknowledgment Report. A Monthly Report is sent to the Tall Elk Chairman to identify the funds received and recorded at the State Office. Reports are illustrated in Appendix K.

PROMOTION

The Tall Elk Chairman promotes the Program on a continuing basis on the Lodge floor, but more importantly in the Lodge Bulletin. He should arrange for insertion of Tall Elk brochures in direct mailings to all Lodge members at least annually. The annual dues notice mailing by the Lodge is an ideal time to insert literature about the Program. If possible, include a space on the dues notice for a donation to the Program.

AWARDS

The Tall Elk Chairman should assure that the recipient of a Silver or Gold Card, as well as an Emerald and Diamond Award are properly recognized within the Lodge and in the Lodge Bulletin. He should make certain that an attractive Tall Elks roster is maintained in a conspicuous location in the Lodge building. He should coordinate with the State Office, as necessary, to ensure that his records and the records maintained in the State Office are the same.

This can be accomplished by requesting a copy of the Gift History Report. Any difference between this report and Lodge records should be addressed to the State Office for clarification.

SPECIAL FUND-RAISING PROGRAMS

Each Tall Elk Chairman should plan at least one, but preferably two, activities each year as part of the Exalted Ruler's total program, specifically for the Therapy Program. The project could be a raffle, circus, dance, special bingo night or any other effective fund-raising activity. A special committee may be desirable to plan and accomplish such an event. This committee should be under the auspices of the Tall Elk Chairman.

DEMONSTRATIONS

Therapy Demonstrations have proven to be an effective way of acquainting the membership, their families, and friends with the nature and scope of the Program. However, it should be scheduled with the Therapy Program Trustee responsible for your Lodge, see Appendix H, well in advance and well publicized. It is suggested that the demonstration be open to the public and be an open Lodge meeting with little or no other business transacted. Publicity through all the media before and after the Demonstration is essential. Brochures, envelopes, and displays should be available to aid in the successful education of those attending.

NEWS ARTICLES

The Tall Elk Chairman should arrange for a steady flow of news items for the Lodge Bulletin and the local news media. These could include the listing of new Tall Elk contributors, listing of those who achieve the various giving levels, pictures of a Therapy Unit, statistical information from the State Office, and anything that keeps the Program before the membership and the public. Keep in mind that less than 10% of the members attend Lodge meetings on a regular basis. The objective is to communicate with 100% of the membership. If there is an Emblem Club or Ladies of Elks, get that group behind the Program as Tall Ladies.

DISPLAYS

A banner stand display is available for Lodge use. There is a large display that is also available, but it must be set-up by the Trustee, Program Chairman or the Therapy Program Manager. When erected it is about ten feet wide by seven feet tall. Both displays need to be requested at least three weeks before the Lodge event. Availability is based on a first come first served basis and the ability to get it to the Lodge without the Program incurring a large expense.

TALL ELK RECEIPTS

Receipt # 0000	
Please PRINT Carefully and fill Every Blank	
Lodge # _____	Member # _____
Full Name _____	
Address _____	
City _____	
State _____	ZIP _____
Date _____	Amount \$ _____
Check here if New Address <input type="checkbox"/>	
Send Check to:	
Washington Elks Therapy Program for Children, Inc. PO BOX 110760 Tacoma, WA 98411-0760	

TALK ELK MEMBER	
Donor Full Name _____	
_____	\$ _____
Date _____	Amount _____
Washington Elks Therapy Program for Children, Inc.	Receipt # 00000000

Lodge Representative	

This portion of the Talk Elk Receipt is to be sent to the State Office with the same amount of money.

This portion of the Tall Elk Receipt is to be given to the donor

The second copy (Blue) of the Tall Elk Receipt is to remain in the book and is the Lodge Record.

APPENDIX E

Living Tribute Chairman Duties (Detail)

(Revised 1/2012)

Duties of a Lodge Chairman

LIVING TRIBUTES – THERAPY CHAIRMAN DUTIES (Detail)

The living tributes are used to promote donations to the Washington Elks Therapy Program for Children, Inc. through the use of the Living Tribute Envelopes. All funds contributed to our Therapy Program through the use of our Memorial and Honor Envelopes become part of a Trust Fund, and only the interest is used in our current expenses. You do not have to be an Elk to use these Envelopes, nor does the person being honored. Donations made using these envelopes accrue toward the total giving level and qualify to be included as a donation which is tax exempt.

EVERYONE CAN USE “LIVING TRIBUTE” ENVELOPES

MEMORIAL GIFTS

A green colored envelope has been created for this purpose. It clearly specifies “MEMORIAL GIFTS” on the front and interior. It is used to honor a loved one or friend who has passed away. The interior of the envelope provides identity of the person being memorialized, the donor, and who should receive an acknowledgement of the donation. No minimum gift is required. When the gift is received at the State Office a receipt is sent to the donor and an acknowledgement sent to the surviving members of the family. The amount of the gift is not mentioned when the acknowledgement is sent.

(A multi-purpose pink envelope has been developed to replace the green and blue envelopes. The green and blue envelopes will continue to be used until the stock is depleted.)

HONOR GIFTS

A blue envelope has been created for this purpose. It clearly specifies “HONOR GIFTS” on the front and interior. It is used to honor a friend or loved one on any special occasion. Suggested occasions may include birthday, anniversary, graduations, expression of appreciation, get well or a holiday. The interior of the envelope provides for the identity of the person being honored, the donor who will receive an acknowledgment card designed for the occasion being celebrated. When the gift is received at the State Office a receipt will be sent to the donor and an acknowledgement card sent to the person being honored. The amount of the gift is not mentioned when the acknowledgement is sent.

DISTRIBUTION OF LIVING TRIBUTE ENVELOPES

Each lodge should have a board in an appropriate location within the Lodge with holders for the envelopes.

The Memorial Gift envelope should be distributed to every funeral home in the jurisdiction of the Lodge and should be available to everyone, Elk or non-Elk, who visits to pay their respects to a deceased friend or relative. These envelopes can also be placed in mailing to the membership to ensure that all of the membership is aware of this program.

MEMORIAL BOOKS

A beautiful purple leather-like bound book, 5 x 7 inches in size, is available for the presentation to the surviving family members of a deceased member. **The inside provides a gold printed copy of the “Eleven O’Clock Toast” and a certificate stating** that the lodge has made a donation to the Therapy Program in the name of the deceased member and signed by the Exalted Ruler. These books provide a way of recognizing to the family the manner in which ELKS remember their departed members and are available from the State Office.

DESCRIPTION OF WHAT HAPPENS TO THE MEMORIAL & LIVING TRIBUTE ENVELOPES WHEN SENT TO THE STATE OFFICE

Memorial Envelopes are very easy to use to make contributions in memory of a loved one, friend or business associate. Honor Envelopes can be used to remember someone on a special occasion such as a birthday, anniversary, graduations, sickness, hospitalization, etc. It is important that we know how to use them and what happens to that envelope after it reaches our State Office

Complete the information the envelope flap, This provides the State Office the required data to record your Memorial or Honor Gift correctly. These envelopes are self-addressed, so after completing this information, insert check, apply the postage and drop it in the mail box. Checks should be made to the Washington Elks Therapy Program for Children.
(WETP)

The State Office will notify the contributor that his gift has been received and will send him a receipt for tax purposes. **They will also notify the person(s) listed as "SEND ACKNOWLEDGEMENT TO:)" with an appropriate message of your gift** to the Therapy Program. The amount of the gift is not mentioned.

MEMORIAL ENVELOPE (UPPER FLAP)

MEMORIAL GIFTS:

The Washington Elks Therapy Program for Children, Inc. is on way of honoring a loved one or friend who has departed. This provides a wonderful opportunity for friends of the Program to express their love and concern. There is no better way **to show one's appreciation and sympathy in times or sorrow. It is also a kind way to note the anniversary of someone's** passing.

Amount of Gift \$ _____ In Memory of: _____
 Given By: _____ Send Acknowledgment to: _____
 Name _____ Name _____
 Address _____ Address _____
 City _____ State _____ ZIP _____ City _____ State _____ ZIP _____
 If donor is and Elk:
 Lodge Number _____ Membership Number _____

Receipt for a Memorial Gift



"FOR THIE KIDS"
 Washington Elks Therapy
 Program for Children, Inc.
 PO Box 110760 Tacoma, WA 98411-0760
 (253) 472-6223

Please notify us if your address has changed.
 You should retain this receipt for tax purposes

Harry & Mary Smith
 123 Main St
 Hometown, WA 98999

Our Program is Special
THANKS TO YOU!

Thank you for your continuing support of the Elks Therapy Program. **The "Kids" appreciate your generosity. Your Memorial Gift brings your total giving to \$XXXX as of ____/____/____**

An Acknowledgement was sent to:
 Mrs. John Doe and Family
 PO BOX 287
 Topeka, KS 55555

RECEIPT

Lodge	Member #	Date Received	Contribution given	Amount Given
2796	01235	11-15-2006	In Memory of John Doe	\$10.00

Acknowledgement for a Memorial Gift (Card)

The Washington Elks Therapy Program for Children provides services to developmentally delayed children throughout Washington State. These services are provided under the direction of a physician and at no cost to the families and are provided in the home with the parent or guardian present. Priority is given to infants and young children you are medically fragile, or who would otherwise go without services because of health problems, lack of other resources, or who, without services, will experience deterioration in their status.

*The Washington Elks Therapy
 Program for Children, Inc. gratefully
 Acknowledges a contribution
 in memory of*

Jane Doe

Given by:
John and Mary Smith
123 Main Street
Hometown, WA 98999

HONOR ENVELOPE (UPPER FLAP)

HONOR GIFT

May we suggest that you honor your friends or a loved one on any special occasion with an Honor Gift to the Washington Elks Therapy Program for Children, Inc. What a thoughtful way of remembering those you love.

OCCASION: ____ BIRTHDAY ____ ANNIVERSARY ____ GET WELL ____ CHRISTMAS ____ GENERAL MESSAGE

Amount of Gift \$ _____ Honor Occasion: _____

Given By:

Name _____

Address _____

City _____ State _____ ZIP _____

If donor is and Elk:

Lodge Number _____ Membership Number _____

Send Acknowledgment to:

Name _____

Address _____

City _____ State _____ ZIP _____

Receipt for an Honor Gift



"FOR THIE KIDS"

Washington Elks Therapy
Program for Children, Inc.

PO Box 110760 Tacoma, WA 98411-0760
(253) 472-6223

OUR THANKS

YOUR SUPPORT MAKES THE DIFFERENCE

Thank you for your continuing support of the Elks Therapy Program. The "Kids" appreciate your generosity. Your Honor Gift brings your total giving to \$XXXX as of ____/____/____

Please notify us if your address has changed.

You should retain this receipt for tax purposes

Harry & Mary Smith
123 Main St
Hometown, WA 98999

An Acknowledgement was sent to:

Mrs. John Doe and Family

PO BOX 287

Topeka, KS 55555

RECEIPT

Lodge	Member #	Date Received	Contribution given	Amount Given
2796	01235	11-15-2006	In Memory of John Doe	\$10.00

Acknowledgement for a Honor Gift (Card)

The Washington Elks Therapy Program for Children provides services to developmentally delayed children throughout Washington State. These services are provided under the direction of a physician and at no cost to the families and are provided in the home with the parent or guardian present. Priority is given to infants and young children who are medically fragile, or who would otherwise go without services because of health problems, lack of other resources, or who, without services, will experience deterioration in their status.

*The Washington Elks Therapy
Program for Children, Inc.*

*Acknowledges the gift of a lifetime in helping
"Our Kids" with the message:*

"_____"

Given by:

John and Mary Smith
123 Main Street
Hometown, WA 98999

MEMORIAL BOOK

You have heard the tolling of eleven strokes. This is to impress upon you that with us the hour of eleven has a tender significance. Wherever Elks may roam, whatever their lot in life may be, when this hour falls upon the dial of night, the great heart of Elkdom swells and throbs. It is the golden hour of recollection, the homecoming of those who wander, the mystic roll call of those who will come no more. Living or dead, Elks are never forgotten, never forsaken. Morning and noon may pass them by, the light of day sink heedlessly in the West, but ere the shadows of midnight shall fall, the chimes of memory will be pealing forth the friendly message, **"To Our Absent Members."**



The Benevolent and Protective Order of Elks

Gig Harbor Lodge #2560

Has Made
A Generous Contribution to

The Washington Elks Therapy Program for Children, Inc.

In Memory of

Russell L. Kasselmann

Sept 26, 2000

John P. Jones

APPENDIX F

Bequeaths

Chairman Duties (Detail)

(Revised 6/2014)

BEQUEATHS

The Therapy Chairman is expected to aid in the solicitation of bequeaths to the Washington Elks Therapy Program for Children.

A Wills Brochure has been prepared to acquaint attorneys with the Project and encourage them to recommend to their clients this worthy Program as a beneficiary when preparing wills. There are many ways the Therapy Program can be designated to receive money or property from an estate:

A. Outright Bequeath - This is the simplest means of giving and also the simplest means of obtaining an estate tax charitable deduction.

B. Residuary Bequeath - When provisions have been made for one's family and others and a portion of the estate remains unassigned, the undesignated portion can be given as a residuary interest.

C. Codicil - If a will has already been prepared and is up-to-date, a charitable bequeath, if it is not now included, may be provided through the addition of a codicil to the will. This should be prepared by an attorney.

D. Annuity or Life Income by Will - There is a choice of arrangements that can be created by a will to provide an annuity or life income to one's beneficiary with the remainder going to the Therapy Program.

All of these plans provide an allowable estate tax deduction for the value of the gift. Every member of every Lodge should be encouraged to have an up-to-date will and, if their circumstances permit, should be encouraged to consider the Therapy Program as a worthy beneficiary.

The Therapy Chairman and their committee should contact all attorneys (Elk and non-Elk) in the jurisdiction of the Lodge, provide them with literature about the Program and arrange for brochures to be available to his clients in his reception area. Likewise, articles addressed to this subject are appropriate for inclusion periodically in the Lodge bulletin.

Appendix G

Therapy Program Workshop Agenda

(Revised 6/2014)

THERAPY PROGRAM WORKSHOP AGENDA

The following is a proposed agenda for use by the Therapy Program Trustees working with the Lodges assigned to them. It is recommended that each member of the Therapy Program Committee hold a very informal workshop within one of the Lodges assigned to them for the Lodges under their jurisdiction. In some areas, it may be necessary to hold these in two different locations because of the distance traveled.

It is recommended that Exalted Rulers, Leading Knights, Major Project Lodge Chairmen, and Major Project Committeemen within each Lodge be in attendance. This would not preclude other officers from participating, but those listed above are essential to the effectiveness of this workshop. The agenda for the meeting should consist of at least the following:

1. Introduction. An introduction of those in attendance, identifying the office or committee assigned to them.
2. The Purpose of the Workshop. It should be explained that the purpose of the workshop is to familiarize those in attendance with the scope and nature of a Lodge committee devoted to all facets of the Major Project. It is intended that during the course of the workshop, everything pertaining to the Project will be covered in depth. All in attendance should be requested to keep notes of the various materials distributed during the session. This would provide a way of identifying material they might desire to order from the State Office.
3. Presentation of Therapist. It isn't mandatory, but it is beneficial if the therapist who works in that particular area could attend the workshop and describe a typical day in their activities. The therapist can describe the various activities they are engaged in and the different patients which they deal with in the course of the day. The attendees should take this opportunity to question the therapist to clarify in their minds any item that they feel is appropriate and helpful to them.
4. Description of the Committee. Appendix D of this Manual describes the responsibilities of the Lodge Tall Elk representatives to the Therapy Program and should be available to those present, and each of the four facets of the committee's responsibilities should be elaborated upon and questions answered.
5. Tall Elks:
 - a. Therapy Program brochures should be distributed, and a Tall Elks display should be displayed for those who have not seen it.
 - b. Tall Elks/Tall Lady Receipts. Tall Elks/Tall Lady receipt books should be distributed and detailed instructions given as to how these receipts should be processed, how to account for receipts, and how to forward funds to the State Office.
 - c. Tall Elks/Tall Lady Pins. The Tall Elks/Tall Lady pins should be displayed and it should be explained how these pins may be obtained.
 - d. Awards. Diamond, Emerald, Gold and Silver Tall Elks memberships should be described in detail. (See Appendix L for a complete list of Awards.)
6. Coin Boxes. The use of Coin Boxes should be explained with emphasis placed on instructing Lodge Office personnel to provide new Coin Boxes to those who turn in a full Coin Box. Lodges should also be encouraged to conduct a special event, such as a dinner, to collect Coin Boxes.
7. Bequeaths. Brochures should be distributed and the program for placing these in mortuaries, as well as in all members' homes, should be described. It is suggested that these be inserted with dues notices or other mailings to the members. Articles for their bulletins should be regularly submitted to the editor which encourages the members to carry them in their pockets and use them whenever a friend or relative is deceased in lieu of other expresses of condolence.
8. Wills. The subject of wills should be discussed. The committee could encourage attorneys in their community to become familiar with the program and encourage their clients to make the program a beneficiary. It is suggested that one member of the committee be an attorney if possible, to cover this aspect of the project.

9. Special Programs. There should be a discussion relative to the need for each Lodge to conduct at least one special program each year to generate additional income for the project in addition to the per capita or Tall Elks contributions. It could be a Coin Box Program wherein on a special night all members bring their Coin Boxes, or some other special program.

10. Demonstrations. Demonstrations are encouraged but only when they are well planned, well publicized, preferably open to the public and when assured of a large attendance.

11. Publicity. The need for continuing publicity should be emphasized, not only to the membership, but to the community through newspaper coverage. There are excellent examples of good coverage, and these can be made available through the office to the committee member conducting the workshop utilizing material from other publications as examples.

12. Lodge Bulletin. The Lodge members in attendance should be encouraged to make certain that every issue of the Lodge Bulletin contain some article relative to the project and also an application form for membership in the Tall Elks. There is a great source of material that can be useful in a Lodge Bulletin. It would be advisable to distribute typical material for this purpose if possible. Much can be obtained from the State Office. The bulletin should also be used as a device for reporting information about the project itself, i.e. story of the therapist, the mileage covered, the number of children in the caseload, human interest stories without identifying the patient, etc.

13. Inserts in Dues Notices. The officers in attendance should be encouraged to use dues notices and other mailings to the members as a means of regularly distributing Tall Elks applications, special bequeaths envelopes, information about wills, etc. Those Lodges that have taken advantage of this have found it to be extremely effective.

14. Lobby Displays. Each Lodge should be encouraged to develop a permanent display depicting the project and its results. This not only keeps the membership informed, but it is also another means of project exposure to the general public who visit the Lodge.

15. Composition of the Lodge Committee. Ideally, it should be recommended that the committee within each Lodge be comprised of at least seven members if it is to be effective. Too frequently a single person is identified as Tall Elk Chairman, and the entire burden rests on them to cover this very broad subject. The committee should consist of a chairman and, in addition, a member for:

- a. Tall Elks
- b. Memorials and Bequeaths
- c. Wills
- d. Special Funding Programs
 - 1) Equipment Fund
 - 2) Coin Box Counting
 - 3) Lodge Programs
- e. Publicity

Each member of the Therapy Program Committee can devise his own agenda. The above suggested agenda outline has proven to be effective, but the agenda to be used by each committeeman should be tailored to satisfy his own local situation.

APPENDIX H

Therapists Visitations

(Revised 1-2013)

Therapist Visitations to a Lodge

A Lodge may, through their respective Therapy Program Trustee, invite a therapist to visit. The purpose of the visit may be any of the following:

1. Therapy Program Demonstration - A program in which the therapist asks a family to come to the Lodge with a child who is receiving services from the Therapy Program. The therapist demonstrates therapy techniques used in the program established to assist the child in reaching specific goals.
 2. Presentation - such as:
 - a. Introduction to the Lodge/Community (get acquainted visit). Used as a means for a Lodge/Community to meet a newly assigned therapist. The therapist will provide information relative to their background, education and experiences.
 - b. A day in the life of an Elks therapist. The therapist details everyday challenges experienced in operating a mobile "in-home" therapy unit.
 - c. Equipment Demonstration. The therapist empties their car and illustrates how the various pieces of equipment and toys are used as part of the therapeutic process.
 - d. Specific topic/disability. The therapist presents information on a specific topic or disability, such as downs syndrome, cerebral palsy, fetal alcohol syndrome, "Why home visits?", or special programs.
 3. Fund Raising Function - The therapist attends a fund raising function, such as a Coin Box Dinner, etc. and is available to answer questions
- 1.1 The Lodge Tall Elk Chairman or Ladies Organization Tall Lady Chairman will:
 - a. select a variety of dates for a Therapist Visit for consideration.
 - b. contact the Therapy Program Trustee responsible for that Lodge to schedule a Therapist Visit. Therapy Trustee Lodge responsibilities are listed in the current State Association Directory.
 - c. make the request as early as possible but at least six (6) weeks prior to the dates requested.
 - d. schedule the program early if a child is involved. This will allow the child to be home for their normal bedtime.
 - 1.2 The Therapy Trustee will:
 - a. Check with the State Office to ensure the availability of the requested date.
 - b. Contact the therapist in the area as to the availability of the dates being considered.
 - c. Once the date has been cleared with the State Office and Therapist, the Trustee will:
 - (1.) submit Visitation Confirmation Form.
 - (2.) schedule a pre-planning meeting.
 - 1.3 The Therapist will:
 - a. determine availability of dates.
 - b. Select an appropriate family for a demonstration.
 - c. identify any special equipment requirements during the pre-planning meeting.
 - d. make any recommendation for a toy or gift for a child.
 - e. refer any calls requesting a Lodge visit to the Therapy Trustee.

1.4 The State Office will:

- A. Provide the Therapy Trustee with the availability of requested dates from the master calendar
- B. Complete the Visitation Confirmation Form and provide copies to:
 - 1. Lodge Chairman
 - 2. Therapy Trustee
 - 3. Visiting Therapist
 - 4. Therapy Program Chairman
 - 5. Therapy Supervisor
- C. Respond to requests for the Therapy Displays.
- D. Formalize and provide copies of the agenda, news releases and flyers to the Tall Elk Chairman.

2.1 The pre-planning meeting will be conducted, usually at the Lodge involved.

Other locations may be used as mutually agreed upon by the participants.

The pre-planning meeting should be attended by the Exalted Ruler, Tall Elk and Tall Lady Chairmen, the Therapist and the Therapy Trustee.

2.2 The purpose of the pre-planning meeting is to formalize the details of the Therapist Visit. The Pre-Planning Check List will be reviewed and completed by the Therapy Trustee.

2.3 Complete and mail to the State Office the following blank forms:

- a. Promotional Flyer
- b. News Releases
- c. Agenda

3.0 Conduct of the Visit:

3.1 Introduce the principals involved

3.2 Conduct program

3.3 Close and offer thanks

PRE-PLANNING CHECK LIST

Date: _____ Lodge: _____

Trustee: _____

Therapist: _____

Tall Elk/Tall Lady Chairmen: _____

Type of Visit Being Planned:

Presentation - Check

- Introductory _____

- Equipment Demonstration _____

- A day in the life of a Therapist _____

- Specific topic/disability (.....) _____

Therapy Demonstration _____

Attend a Therapy Function:

- Coin Box Dinner _____

=====

INVITATIONS

Send invitations to: Check

All State Officers and Committeemen in your District:

Vice President _____

Financial Trustee _____

District Trustee _____

District Trustee _____

State Committee Chairmen _____

Other Committee Members _____

All Therapy Program Personnel:

Program Chairman _____

Tall Elks _____

Tall Ladies _____

Bequest _____

Living Tribute _____

Other Trustee in your District _____

District Deputy Grand Exalted Ruler _____

Local civic and government leaders _____

Other Fraternal and/or Service Organizations _____

=====

PUBLICITY

Use the talent of your Lodge Public Relations Chairman to:

Complete blanks on flyer _____

Prepare and submit an article for the next two issues of your

Lodge bulletin _____

Prepare and submit an article for local newspaper _____

Prepare and submit material for local radio station _____

=====

FACILITIES/EQUIPMENT NEEDS

Area in Lodge where visit will be held: _____

Identify audio/visual needs:

Item Responsible Person

Microphone _____

Flip chart _____ Projector _____

Therapy Display * _____

Other: _____

* Order the Therapy Display from the State Office (1-800-TAL-ELKS). Please note: The Large Display requires a space approximately ten feet wide with accessibility to an electrical outlet. The Small

THERAPY DEMONSTRATION

Child/family: Family Size: _____

Invited to meal? _____

Any special meal requirements or other special requirements of family?

Toy gift recommendation of therapist: _____

Alternate plan if child becomes ill: _____

=====

==== AGENDA

Master of Ceremonies: _____

Introductions by: _____

Other Presenters: _____

Closing: _____

THERAPIST VISITATION CONFIRMATION FORM

Section 1(To be completed by the Therapy Trustee)

Date Submitted: _____

Chairman _____

has requested that therapist _____

visit _____ Lodge

on _____

(Day, Month, Date, Year)

for the purpose of _____.

The submission of this form is to confirm that this date is available on the State Association calendar as well as being available on the therapist schedule.

Submitted by: _____

Trustee, _____ District, _____

Section 2 (To be completed by the State Office)

This confirms the date of _____ for the Therapist Visitation.

This date has been reserved on the master calendar at the State Office.

COPY to: Lodge Chairman

Therapy Trustee

Visiting Therapist

Therapy Supervisor

Therapy Program Chairman

Therapist visitations and Therapy Presentations

ALL Therapist visitations and Therapy Presentations MUST be approved and scheduled through the WSEA State Office.

Forms must be completed by both the lodge chairman and the therapy trustee for your lodge. PLEASE DO NOT schedule directly with your therapist.

APPENDIX I

Reasons for Giving

(Revised 1-2007)

Reasons for Giving

Tall Elks (General Ledger Account 4020) – Identifies contributions to the Therapy Program from Elks and other individuals and accounts for donations up through and including \$500.00. It also includes donations in excess of \$500.00 from organizations. These funds are used for the general operation of the Program.

Tall Ladies (General Ledger Account 4030) – Identifies contributions from women who contribute to the Therapy Program and accounts for donations up through and including \$500.00. It also includes donations in excess of \$500.00 from Ladies Organizations. These funds are used for the general operation of the Program.

Gerald Calkins Equipment Fund (General Ledger Account 4240) – Donations from individuals or groups who specify that their donation is to be used to purchase equipment for patients which is not normally provided by the program. These funds are usually requested by a therapist to satisfy a specific need of a child and the request requires the approval of the Therapy Supervisor. The difference between the amount of Equipment Fund Income (4240) and Equipment Fund Expenses (5380) are transferred to the Fund Obligation Equipment Fund (General Ledger Account 3400) in June.

Coin Boxes (General Ledger Account 4260) – Identifies all donations received in a Coin Box and those generated by a **Coin Box Function which includes donations made by people who couldn't attend a Coin Box Function. These funds are** used for the general operation of the Program.

Tall Elks Trust (General Ledger Account 3300) - Identifies contributions to the Therapy Program from Elks and other donors and accounts for donations of more than \$500.00. These funds are added to the corpus of the Trust Fund.

Tall Ladies Trust (General Ledger Account 3301) - Identifies contributions to the Therapy Program from Elks and other donors and accounts for donations of more than \$500.00. These funds are added to the corpus of the Trust Fund.

Memorials (General Ledger Account 3302) – **Identifies contributions made “In Memory of _ _ _ _ _”.** These funds are added to the corpus of the Trust Fund.

Honor Gifts (General Ledger Account 3303) - Identifies contributions made in honor of an occasion or event. These funds are added to the corpus of the Trust Fund.

Bequeaths (General Ledger Account 3308) - Identifies contributions from wills and/or codicils. These funds are added to the corpus of the Trust Fund.

APPENDIX J

COIN BOX DINNERS

(Revised 6/2014)



COIN BOX DINNERS

COIN BOX DINNER PROGRAM

Coin Boxes are a fun way to raise money to support the Therapy Program. It may be difficult to believe but the average amount of money collected in Coin Boxes over the past few years is \$18.21. If you were able to take all the change you receive through every day transactions without spending any and place it all in a Coin Box, you would accumulate around \$33.00. A Coin Box filled with a specific coin yields:

<u>Coin</u>	<u>Amount</u>
Pennies	\$3.75
Nickels	\$12.50
Dimes	\$50.00
Quarters	\$54.00
Fifty Cent Pieces	\$96.00
Sacajawea Dollar	\$102.00

Lodges are encouraged to promote the use of Coin Boxes through their Lodge meeting and bulletins. When anyone fills a Coin Box, the full box can be taken to ANY Elks Lodge within the state of Washington and the Lodge will provide them with a new Coin Box.

The Lodge receiving the full Coin Box will:

1. Count the contents
- 2. Record the amount, donor and donor's Lodge number on a Coin Box Transmittal Report Form**
3. Deposit the money in a bank and prepare a check made payable to the Washington Elks Therapy Program for Children, Inc. (WETP)

The State Office will provide the donor with a receipt and has additional Coin Boxes available upon request.

Coin Boxes are most advantageous when used in conjunction with an event planned by the Tall Elk/Tall Lady Chairperson. Events such as a Coin Box Dinner or a Coin Box Breakfast have been very successful and it gets people in the habit of placing their coins in a box to help **“OUR KIDS”**

A “Here is My Donation” form is included in the letter to each member, in the event they cannot attend the scheduled event.

Suggestions for planning a Coin Box Event

- A. Select a date at least three month in advance
- B. Determine the type of event (dinner, breakfast, ice cream social, etc.) At this stage, plan a meal whereby those bringing a full Coin Box are provided the meal at no cost and those without a Coin Box pay an established price. For example, plan a spaghetti dinner and set the price at \$7.00 per person. If a couple attends and only one has a Coin Box the other pays \$7.00. This should cover the cost of both meals.
- C. If, as part of the Coin Box Event, a visit to the Lodge by a Therapist is envisioned for a Therapy Demonstration, refer to the procedures in Appendix H of this Therapy Training Manual
- D. Complete the Coin Box Event Form if you wish the letters to be provided by the State Office. Send these letters to your membership telling them about your event.

The State Office will provide:

Coin Boxes.

Sufficient letters with attached “Here is my Donation” forms for your mailing list.

Hernia Award Certificates.

Reimbursement to your Lodge for the cost of postage if the Lodge uses their 3rd class Bulk Permit. A copy of the actual postal charges must be submitted before reimbursement will be made.

After the Coin Box Event-

1. Count the money keeping a separate count for each individual donor. Each donor will receive a receipt from the State Office along with a new Coin Box.

2. Complete the Coin Box Donations Transmittal Report form with each donation whether from a Coin Box or a "Here is My Donation" form.

3. Prepare a check for the total amount collected made payable to the Washington Elks Therapy Program (WETP) and forward it with the Coin Box Transmittal Report to the State Office.

4. Notify the State Office of the person selected to receive the Hernia Award. The State office will prepare the certificate and mail it to the lodge.

Washington Elks Therapy Program for Children, Inc.

Planning a Coin Box Event?



We'll help you if you'll help us.

Please provide the following information:

Lodge _____ Event Date _____ Time _____

Person in Charge _____ Phone # _____

Alternate _____ Phone # _____

Type of Event _____
(Dinner, Breakfast, etc)

Menu/Event Details for letter _____

_____ Meal Cost w/o Coin Box \$ _____

Do you wish a "Hernia Award" certificate? Yes ☐ No ☐

Will a Therapist be attending? Yes ☐ No ☐ If Yes, Why? _____
(Demonstration, etc)

Do you need Coin Boxes? Yes ☐ No ☐

Number of names on Lodge Mailing List _____

Signature:

Sign within the block - do NOT cross lines.

Signature should be Exalted Ruler or Tall Elk Chairman.

Provide a copy of your Lodge letterhead.

Submit completed form 90 days prior to the Coin Box Event Date

Sample Letter

Dear Members,

What do you do with your spare change? Would you like to help a child with a developmental problem? You can answer both questions by filling the enclosed coin box for "OUR KIDS".

"OUR KIDS" receive pediatric therapy from our professional staff of therapists because of the generosity shown by people like you. The kids our staff visits have no other source of therapy readily available to them and without your help would probably go without therapy services.

To encourage your help, our lodge has scheduled a "Coin Box Dinner _____. The cost of the dinner is only \$____ or a FILLED COIN BOX.

For those who are unable to attend, we offer you a "Here is my Donation" form below. Please complete and return to the lodge with your very greatly appreciated donation.

Start filling your coin box right away. Every coin makes a difference to "OUR KIDS"

We look forward to seeing you there.

Fraternally,

_____, Lodge Therapy Chairman

HERE IS MY DONATION

Regretfully, I cannot attend the coin box dinner at (Lodge Name) on (EVENT DATE), but I want to help support "OUR KIDS" who are receiving services from the Washington Elks Therapy Program for Children, Inc. Enclosed is \$_____ to help "OUR KIDS". This amount is to be applied to my gift account and is tax deductible.

NAME: _____ Lodge membership # _____

Check # _____ (enclosed) or MasterCard _____ Visa _____ American Express _____ (Check one)

CREDIT CARD NUMBER _____

EXP Date ____/____

Signature _____

Mail your donation to: (LODGE NAME) (LODGE MAILING ADDRESS)

COIN BOX POSTAGE REIMBURSEMENT FORM

Lodge Name: _____ Lodge Number: _____

Mailed the material to our member and friends on: (DATE)_____

Enclosed is a copy of the BULK MAIL Receipt from the Post Office for Reimbursement.

Postage per Receipt= \$_____

Submit to: Washington Elks Therapy Program for Children, Inc. (WETP)
PO BOX 110760
Tacoma, WA 98411-0760

[illegible]

This form is available on the WSEA website on the therapy program page under manuals. You may make as many copies as you need to complete your report to the state. EACH donor will receive a receipt form the state office for their generous donation!



Data Collection Survey
of Volunteer, Youth, Charitable
and Community Service Programs

Committee: _____ Date: _____

- A) Program: _____
- B) Number of Participants _____
- C) Number of Elks _____
- D) Number of Helpers _____
- E) Total Elk Hours _____
- F) Total Helper Hours _____
- G) Elk Miles _____
- H) Helper Miles _____
- I) Non-Cash Contributions _____
- J) Cash Donations _____

Column (A)	Describe Program
Columns (B) thru (D)	Count individuals --- not couples, teams or groups
Columns (E) and (F)	Indicate total hours---- if 6 Elks worked 6 hours (6x6=36 total hours)
Columns (G) and (H)	Mileage traveled in preparation for an event itself. Number of people times round trip miles
Column (I)	clothing, bingo, parties, gifts, eyeglasses--- Do not include hours or mileage
Column (J)	Actual cash, checks, money orders or purchase value of savings bonds donated.

Submitted by: _____

Must be completed and returned to the Secretary by the meeting following the program

Elks Care — Elks Share

IMPORTANT

Don't forget to log your volunteer hours and turn them in to your lodge secretary.

This should be completed within two weeks of your event.

Your Lodge #0000

Coin Box Dinner
June 14, 2014

HERNIA AWARD

Presented to:

John Doe

\$100.00

For supplying the greatest dollar value of coins in support of "Our Kids"
and the Washington Elks Therapy Program for Children, Inc.



Lee H. Frankie

Lee Frankie
Therapy Program Chairman



APPENDIX K

REPORTS

(Revised 6/2014)

REPORTS

Section 1 REPORTS TO THERAPY PROGRAM TRUSTEES

Trustees of the Washington Therapy Program for Children, Inc. are responsible for the finances of the organization. To keep abreast of the financial status of the program, they are provided with a Monthly Financial Report. The Report has been designed to provide Financial Highlights, Balance Sheet and Income Statement.

Attached to the Financial Reports are various reports of giving to our Program. These are also described in this Appendix. Some of these same giving reports are also forwarded monthly to the Therapy Program Chairmen, Lodge Tall Elk Chairman and Ladies Organizations Tall Lady Chairman.

FINANCIAL REPORTS

FINANCIAL STATEMENT HIGHLIGHTS – Each month the Treasurer reviews the Financial Report prior to publication.

As a result of this review, he prepares the Financial Highlights bringing to the attention of the reader significant changes in the financial position. Budget shortfalls, and other activity important to those responsible for the financial aspect or our organization.

BALANCE SHEET – Identifies what the program owns and owes. The net result is the program equity.

INCOME STATEMENT – Identifies funds generated and funds dispersed for the month and year to date. This allows for a comparison with the current approved budget.

Section 2. REPORTS PROVIDED TO TALK ELK/TALL LADY CHAIRMEN

Each month the State Office provides each Tall Elk and Tall Lady Chairman with a series of reports to inform them of the progress the Lodge or Ladies have made towards reaching the established goals. It also provides information on the types of giving achieved and can be used to determine which areas need more emphasis.

2.1 REPORT OBSERVATIONS

These observations are prepared by the Program Manager and give his observations based upon monthly reports.

2.2 GIVING REPORTS

DONATION SUMMARY REPORT – The donation summary report identifies the number of donations and dollar value for the particular month and year-to-date. The reports is sorted by Division and calculates the average amount of the donations as well as providing a Per Member amount. The report also ranks the Lodges standing compared to all the other Lodges in Washington State

INCOME ANALYSIS: by GL CODE – The income analysis by GL Code provides the number of donations and funds received for the report month and for the current fiscal year. It compares it with the prior year and provides a percentage of variance. It also compares the average gift and variance between the current year and last year. The report breaks down the value of the gifts in ranges and reflects the support for the various types of giving.

INCOME ANALYSIS: by Lodge Code – The income analysis by Lodge Code provides the number of donations and funds received for the report month and for the current fiscal year. It compares it with the prior years and provides a percentage of variance. It also compares the average gift and variance between the current year and last year. The report breaks down the value of the gifts in ranges and reflects support to the Therapy Program by each lodge.

DONATION LODGE REPORT – Lists by membership number and name donations posted that month from individuals associated with a particular lodge. It also lists the date the donation was posted, the amount given, the total given by the individual, the fund to which it was posted and the origin code which tells the source of the donation.

Section 3. REPORTS AVAILABLE UPON REQUEST

GIFT HISTORY REPORT – A detailed report of gifts from individuals associated with a particular lodge. The Gift History report may be used to locate the details of donations by and individual member or group. It is a source of information for updating a Lodge Tall Elks Board. Some chairmen use it to track individual donations. It can be prepared in four different formats:

- All members associated with a Lodge

- All Ladies associated with a Lodge

- All Donors associated with a Lodge

- All donors by a specific MEMBER STATUS CODE – up to 4 codes

DONATION REPORT – Produced in the same format as the Donations by Lodge Report but can be for a specific range of dates. The date range MUST be specified when the request is mad. This report can be used to update local donation records.

TOTAL DONATIONS BY LODGE MEMBERS – **This is a customized report showing the total donations for a Lodge's members.** (Name, member #, and last date contributed)

GIFT HISTORY REPORT

Produced upon request of the Talk Elk/Tall Lady Chairman. It can be produced in the following formats. (PLEASE specify format)

- All members associated with a Lodge
- All Ladies associated with a Lodge
- All Donors associated with a Lodge
- All donors by a specific MEMBER STATUS CODE – up to 4 codes

ID Lodge number followed by membership numbers;
8000 or 9000 series identify non-member;
W suffix for Ladies.

Name/Address Self Explanatory

Member Status A = Contributor
D = Dropped Member
L = Non-Contributor
M = Deceased
X = Mail returned, invalid address

Mail Code Y = receives mail
N = do not mail to

Date Date donation is recorded at the State Office.
3/31/88 is a summary of prior gifts.

DESG 01 Tall Elks General
 02 Tall Lady General
 05 Gerald Calking Equipment Fund
 06 Coin Box
 10 Talk Elks Trust
 11 Tall Ladies Trust
 12 Memorial
 13 Honor Gift
 14 Bequeath

Gift Amount Self-Explanatory

GTD Total giving to date

YTD Giving level for the current fiscal year
April 1 through March 31

Donation by Lodge Report

<u>Column Number</u>	<u>Description</u>
ID	Membership Number
	Numbers in the 8000 series are assigned to non-members or when no membership number is given on a receipt. Numbers in the 8000 Series with a W Suffix are Ladies.
	Suffixes:
	W, E or L = Tall Lady, Emblem or Ladies of Elks
	T = Travel Club
	B = Bowling Group
	P = Lodge PER Association
Name	Donors Name
Date	Date donation entered into gift file
Amount	Amount of Gift
TD Total	Donor's total accumulated donations
Fund	Fund where donation is deposited
Origin	LR = Regular donation received with a receipt form the Tall Elk/Tall Lady Chairman
	M = Memorial Gift
	H – Honor Gift
	KK = Donation received at the State office from the donor
	CB = Donation received from a coin box
	MO = Donation from annual Mail-Out

(TD TOTAL can be used to update the Lodge Talk Elk/Tall Lady Board and determine the giving levels and awards issued.)

This report is not produced if there were no donations received from a Lodge in a particular month.

GIVING GOAL PROGRESS REPORT

<u>COLUMN</u>	<u>DESCRIPTION</u>
Dist.	District in which the lodge is located
Lodge Name	Self-Explanatory
Member	Membership as of April 1
TE Gen	Donations from Individuals or Lodges which are up to and including \$500
TE Trust	Donations from Individuals what are more than \$500
TL Gen	Donations from the Ladies which are up to and including \$500 and donations from the Ladies Organizations
TL Trust	Donations from Ladies which are over \$500
Gerald Calkins Equipment fund	Donation given for the Therapists to purchase special equipment needs for the clients
Coin Box	Donations from Coin Boxes
Mem	Memorial gifts
Honor	Honor Gifts
Total Donations	Either for that month or for the Lodge Year depending on the dates at the from a Lodge top of the report.
X.XX Per/Mem	The Lodge goal for the current Fiscal Year.
Actual Per/Mem	the per member amount for the report period
RNK	The Lodges numerical ranking in relationship to the other Lodges within the State.
Trustee	The Therapy Trustee responsible for that Lodge

APPENDIX L

Awards

(Revised 1/2007)

Washington Elks Therapy Program for Children, Inc.

Awards For Achieving Giving Levels

AWARD	GIVING LEVEL
Tall Elk/Tall Lady A Tall Elk or Tall Lady Pin is given in recognition of an original gift of \$10.00 or more. The Lodge Tall Elk or Tall Lady Chairperson presents it.	\$10.00
Silver Membership A silver card is given from the state office in recognition of the accumulated giving at the \$50.00 level.	\$50.00
Gold Membership A gold card is given from the state office in recognition of the accumulated giving at the \$100.00 level.	\$100.00
Emerald Membership Presented in recognition of the accumulated giving at the \$500.00 level. An Emerald Pin and Membership Card are sent to the member from the State Office. A certificate mounted on a plaque is available only upon request.	\$500.00
Diamond Membership Presented in recognition of the accumulated giving at the \$1,000.00 level. A Diamond Pin and Membership Card are sent to the member from the State Office. A certificate mounted on a plaque is available only upon request.	\$1,000.00
Amethyst Membership Presented in recognition of the accumulated giving at the \$5,000.00 level. An Amethyst Plaque, Pin and Membership card are prepared by the State Office and forwarded to the Lodge Tall Elk Chairman to be presented to the donor.	\$5,000.00
Pearl Membership Presented in recognition of the accumulated giving at the \$10,000.00 level. A beautiful Laser Plaque, a Pearl Pin and Membership Card are prepared by the State Office and forwarded to the Lodge Tall Elk Chairman to be presented to the donor.	\$10,000.00
Ruby Membership Presented in recognition of the accumulated giving at the \$15,000.00 level. A Ruby Pin, Engraved Ruby Plaque and Membership Card are prepared by the State Office and forwarded to the Lodge Tall Elk Chairman to be presented to the donor.	\$15,000.00
Platinum Membership Presented in recognition of the accumulated giving at the \$20,000.00 level. An Onyx Pin, Engraved Platinum Plaque and Membership Card are prepared by the State Office and forwarded to the Lodge Tall Elk Chairman to be presented to the donor.	\$20,000.00
Crystal Membership Presented in recognition of accumulated giving at the \$25,000.00 level. The State Office prepared a beautiful engraved Crystal Award and Membership Card and sends them to the lodge Tall Elk Chairman to be presented to the donor.	\$25,000.00

Note: The achieving of a Giving Level is recognition of a donor's support. It also provides an opportunity to promote the Therapy program. It is suggested that the Tall Elk Chairman makes a formal presentation of awards during Lodge Meetings or other appropriate gatherings and recognized the donors in the Lodge Bulletin. If a donor does **NOT** want recognition the donor's wishes **MUST** be honored.

Silver Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Gold Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Emerald Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Diamond Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Amethyst Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Pearl Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Ruby Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Platinum Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



Crystal Talk Elk



Washington Elks Therapy
Program for Children, Inc.

Secretary



HERE IS YOUR AWARD

Enclosed is a card representing your Membership as a Tall Elk or Tall Lady. You have achieved this with your last donation in support of the Washington Elks Therapy Program for Children, Inc. Our award system has changed as of April 1, 2005. You are now receiving a pin in lieu of a plaque for the \$500 & \$1,000 levels. Should you desire a plaque in addition to the pin, please call us at 253-472-6223 or 800-825-3557 and we will forward it to your Lodge for presentation. Awards are given at the following levels:

MEMBERSHIP	ACCUMULATED GIVING	AWARD
Tall Elk Membership	\$10	Tall Elk or Tall Lady Pin
Silver Membership	\$50	Membership Card
Gold Membership	\$100	Membership Card
Emerald Membership	\$500	*Membership Card & Pin
Diamond Membership	\$1,000	*Membership Card & Pin
Amethyst Membership	\$5,000	*Membership Card, Plaque & Pin
Pearl Membership	\$10,000	Membership Card, Laser Plaque & Pin
Ruby Membership	\$15,000	Membership Card, Red Plaque & Pin
Platinum Membership	\$20,000	Membership Card, Mirror (Purple) Plaque & Onyx Pin
Crystal Membership	\$25,000	Crystal Award



*(Plaques requested are sent to the Lodges the month following the achievement of membership levels. If you do not receive notice of this, contact your Lodge.) Thank you for supporting "Our Kids".

HERE IS YOUR AWARD

Enclosed is a card representing your Membership as a Tall Elk or Tall Lady. You have achieved this with your last donation in support of the Washington Elks Therapy Program for Children, Inc. Our award system has changed as of April 1, 2005. You are now receiving a pin in lieu of a plaque for the \$500 & \$1,000 levels. Should you desire a plaque in addition to the pin, please call us at 253-472-6223 or 800-825-3557 and we will forward it to your Lodge for presentation. Awards are given at the following levels:

MEMBERSHIP	ACCUMULATED GIVING	AWARD
Tall Elk Membership	\$10	Tall Elk or Tall Lady Pin
Silver Membership	\$50	Membership Card
Gold Membership	\$100	Membership Card
Emerald Membership	\$500	*Membership Card & Pin
Diamond Membership	\$1,000	*Membership Card & Pin
Amethyst Membership	\$5,000	*Membership Card, Plaque & Pin
Pearl Membership	\$10,000	Membership Card, Laser Plaque & Pin
Ruby Membership	\$15,000	Membership Card, Red Plaque & Pin
Platinum Membership	\$20,000	Membership Card, Mirror (Purple) Plaque & Onyx Pin
Crystal Membership	\$25,000	Crystal Award



*(Plaques requested are sent to the Lodges the month following the achievement of membership levels. If you do not receive notice of this, contact your Lodge.) Thank you for supporting "Our Kids".

HERE IS YOUR AWARD

Enclosed is a card representing your Membership as a Tall Elk or Tall Lady. You have achieved this with your last donation in support of the Washington Elks Therapy Program for Children, Inc. Our award system has changed as of April 1, 2005. You are now receiving a pin in lieu of a plaque for the \$500 & \$1,000 levels. Should you desire a plaque in addition to the pin, please call us at 253-472-6223 or 800-825-3557 and we will forward it to your Lodge for presentation. Awards are given at the following levels:

MEMBERSHIP	ACCUMULATED GIVING	AWARD
Tall Elk Membership	\$10	Tall Elk or Tall Lady Pin
Silver Membership	\$50	Membership Card
Gold Membership	\$100	Membership Card
Emerald Membership	\$500	*Membership Card & Pin
Diamond Membership	\$1,000	*Membership Card & Pin
Amethyst Membership	\$5,000	*Membership Card, Plaque & Pin
Pearl Membership	\$10,000	Membership Card, Laser Plaque & Pin
Ruby Membership	\$15,000	Membership Card, Red Plaque & Pin
Platinum Membership	\$20,000	Membership Card, Mirror (Purple) Plaque & Onyx Pin
Crystal Membership	\$25,000	Crystal Award



*(Plaques requested are sent to the Lodges the month following the achievement of membership levels. If you do not receive notice of this, contact your Lodge.) Thank you for supporting "Our Kids".

APPENDIX M

SUPPLIES

(Revised 1-2007)

Washington Elks Therapy Program for Children, Inc.

SUPPLIES AVAILABLE FROM THE STATE OFFICE

ITEM: USE:

Tall Elk and Tall Lady Receipt Book

To acknowledge receipts of \$10.00 or more from an individual or organization.

Tall Elk and Tall Lady Pin

To be presented to those who contribute \$10.00 or more to the Therapy Program the first time.

Brochure

Describes the Therapy Program. Is useful at demonstrations and other gatherings to promote the Therapy Program. Often made available in Lodge foyers. Very effective when included with Annual Dues Notices.

Wills Brochure

Describes procedures on the preparation of a bequeath.

Coin Boxes

To be provided to individuals turning in full Coin Boxes and to be provided to Lodges hosting a Coin Box Fundraising Event.

Memorial Book

To be presented by the Lodge to surviving family members in return for a donation to the Program by the Lodge.

Honor Envelope

For Living Tribute contributions to the Program to honor an occasion identified by the donor. Suggested occasions include but are not limited to Birthdays, Get Well, Anniversaries, Thank you, etc.

Memorial Envelope

For Living Tribute contributions to the Program given In memory of someone's passing.

APPENDIX N

Therapy Program By-Laws (Revised 11/2011)

BY-LAWS
OF
WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC.

(Revised 11/2011)

ARTICLE I

Name and Location

1. The name of this Corporation shall be WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC.
2. Its principal office shall be located at 4512 South Pine Street, (Post Office Box 110760), Tacoma, Pierce County, Washington.
3. Other offices for the transaction of business shall be located at such places as the Board of Trustees may from time to time determine.

ARTICLE II

Membership

1. There shall be no capital stock issued by this Corporation. It is strictly understood that the same is a Non-Profit Corporation organized and existing under and by virtue of the laws of the State of Washington. The objects and purposes for which the Corporation is formed and under which it shall operate shall be those set forth in the Articles of Incorporation of WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC.
2. All members of Lodges which are in good standing in the Washington State Elks Association are members of the Washington Elks Therapy Program for Children, Inc.
3. If any Trustee of such corporation shall cease to be qualified to remain as such, pursuant to the foregoing section, his membership in such association shall immediately terminate and a vacancy shall thereby be deemed to exist in such membership. Any vacancy in membership shall be filled by those qualified to become members of such corporation by appointment by the President of the Washington State Elks Association provided that such appointee shall be from the Grand Lodge District, and further that said appointment shall be subject to the Executive Committee of the Washington State Elks Association and the Interim Committee of the Washington Elks Therapy Program for Children, Inc..

ARTICLE III

Trustees

1. The Board of Trustees shall consist of one Trustee for every three (3) subordinate Lodges, or major fraction thereof, in each District Deputy district, plus the Treasurer of the Washington State Elks Association. An additional Trustee should be appointed from the same Grand Lodge District as the appointed Chairman, filling the vacancy created by the selection of a Chairman. The term shall be for one (1) year. Upon completion of the term as Chairman, the individual has the option to complete the remainder of the term as Trustee which he left to become Chairman.
2. The members of the Board of Trustees shall be selected by the Therapy Program Chairman, appointed by the State President, subject to ratification and approval by a majority of the members of the Executive Committee of the State Association.
3. The terms of the members of the Board of Trustees shall be five (5) years. In filling a vacancy the appointment shall be for the unexpired term of the Trustee vacancy.

4. The President shall appoint a member of the Board of Trustees as Chairman for one (1) year.
5. The President, President Elect and all Vice Presidents of the Washington State Elks Association shall be non-voting members of the Board of Trustees of the Corporation.
6. The powers, duties, qualifications and method of conducting the affairs of the WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. shall be strictly in accordance with the Constitution and By-Laws of the Washington State Elks Association, and in accordance with the Articles of Incorporation and By-Laws of this Corporation. In the event there is any conflict between the two, the Articles of Incorporation and By-Laws of the Washington State Elks Association shall govern and control.

ARTICLE IV

Meetings of the Trustees

1. There shall be four annual meetings of the Trustees of WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. One to be held at the time of the Annual Meeting (June) of the Washington State Elks Association and another to be held at the time of the Semi-Annual Meeting (January) of the Washington State Elks Association. The other two meetings to be scheduled in April and October of each year to coincide with the Washington State Elks Association Quarterly meeting and at the call of the Chairman.
2. At such regular meetings, the business of the WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. shall be transacted in accordance with these By-Laws and in accordance with the Constitution and By-Laws of the Washington State Elks Association.
3. Special meetings of the Board of Trustees of the WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. may be called at any time upon the request of the Chairman of the Board of Trustees or the President of the Washington State Elks Association, or by a majority of the Board of Trustees of this Corporation.
4. At least ten (10) days written notice must be given to the members of the WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. of any special meeting called, as above provided for.
5. The Chairman of the Board of Trustees, or, in his absence, one of the Vice Chairmen of the Board of Trustees as identified by the Chairman, shall preside at all such meetings of the Trustees.
6. At every such meeting, each member shall be entitled to cast one vote. No proxies shall be recognized and in order to exercise a vote, the Trustee must be personally present and act in his own behalf.
7. A quorum for the transaction of business at any regular or special meeting shall consist of a majority of the Board of Trustees. If less than a majority should appear at any meeting of the Board of Trustees, those present shall have the power to adjourn the same to a future date and direct the Secretary/Manager to give further notice of such adjourned meeting.

ARTICLE V

Power of Trustees

1. Business of the Corporation shall be managed by the Board of Trustees, who shall be appointed in accordance with the Constitution and By-Laws of the Washington State Elks Association, the Articles of Incorporation and these By-Laws.
2. Any vacancy in membership shall be filled by those qualified to become members of such corporation by appointment by the President of the Washington State Elks Association provided that said appointee shall be from the same Grand Lodge District, and further that said appointment shall be subject to approval of the Board of Trustees of the Therapy Program.

3. At the Annual Meeting of the Washington State Elks Association and at the Semi-Annual Meeting of the Washington State Elks Association, the Chairman or the Vice Chairman shall submit a report to the Convention assembled of the Washington State Elks Association showing the scope of the work performed under the direction of the Board of Trustees, the financial condition of the Corporation, and the condition of any tangible property owned by the Corporation.

ARTICLE VI

Officers and Employees

1. The Chairman of the Board of Trustees of the WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. shall be the presiding officer and the Board of Trustees shall have power and authority to appoint a Secretary/Manager and to allow such compensation and expenses for the office as may be found necessary, the same to be approved by the Financial Trustees of the Washington State Elks Association.
2. The Secretary/Manager of the WASHINGTON ELKS THERAPY PROGRAM FOR CHILDREN, INC. shall issue all notices and have charge of records and shall keep minutes of all meetings held by the Board of Trustees and shall have charge of all the corporate books and papers and seal, and shall attest with his signature and impress with the corporate seal all documents required to be executed by the Corporation, and shall perform all such other duties as are indicant to his office.
3. The Chairman of the Board of Trustees shall appoint an Action Committee, subject to the approval of the Board of Trustees. The Interim Committee shall consist of the Chairman or the Vice Chairman, Treasurer, two (2) members of the Board of Trustees of the Corporation and one (1) member of the Board of Financial Trustees of the Washington State Elks Association, who shall be appointed by the President of the Washington State Elks Association. The Action Committee shall meet with the Secretary/Manager at regular intervals and shall review the activities of the Corporation, the financial status, progress and scope and work of the Corporation, the budgeted expenditures, and shall determine that the policies, as established by the Board of Trustees, are carried out. The Action Committee shall make a report to the Board of Trustees at each regular or special meeting of the Board.
4. The Secretary/Manager shall oversee the business of the Therapy Program and shall supervise all employees. He shall make a progress report at each Action Committee Meeting and shall report to the Board of Trustees of the Therapy Program at each of their meetings.

ARTICLE VII

Amendments

1. Amendments to these By-Laws may be made by vote of a majority of the Board of Trustees at any regular meeting provided for hereinabove, or at any special meeting when the proposed amendment has been set out in the notice calling such meeting.
2. Any other matters which may arise in the operation of the business and affairs of the Corporation shall be performed in accordance with the Articles of Incorporation and By-Laws, and in accordance with the Constitution and By-Laws now existing or which may hereinafter be enacted by the Washington State Elks Association.

ARTICLE VII

Dissolution

1. In the event of the dissolution of the Washington Elks Therapy Program for Children, Inc., all assets of this Corporation remaining upon dissolution, after the satisfying of all debts of the Therapy Program, will be transferred to the Washington State Elks Association Charitable Trust or to the Elks National Foundation.

APPENDIX O

Trust Fund Policy

(Revised 1/2013)

Washington Elks Therapy Program for Children, Inc.

Trust Fund Policy

PURPOSE:

Selected categories of donations will be placed into the Therapy Program Trust Fund for the purpose of generating a return which can be used to fund operating costs.

SOURCE OF FUNDS:

The following categories of donations will constitute the corpus of the Therapy Program Trust:

1. Individual donations of more than \$500.00
2. Memorial Gifts
3. Honor Gifts
4. Bequests

CUSTODY OF TRUST FUNDS:

Donations as listed above will be deposited in a financial institution as selected by the Therapy Board of Trustees. The Investment Committee shall monitor the Trust Fund and make recommendations to the Board of Trustees regarding the allocation of the assets.

DISBURSMENT OF TRUST FUNDS:

Up to 4% of the value of the trust may be expended each year. The level of service will be established annually.

At no time shall any of the corpus of the Trust be used for operating purposes. Funds may be drawn from the Trust for the payment of operating costs as follows:

1. All funds generated as dividends and interest
2. Realized capital gains

Realized capital gains may only be withdrawn to meet operating costs to sustain the level of services authorized by the Board of Trustees. The level of service will be established annually.

Revised 01/2013