



## DISTRICT PRESIDENT VISITATION REPORT

District # \_\_\_\_\_ Lodge # \_\_\_\_\_ Lodge Name \_\_\_\_\_ Date \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Reason for Visitation: Membership Meeting / Joint Meeting / Request by Lodge / Quarterly 1<sup>st</sup>/2<sup>nd</sup>/3<sup>rd</sup>/4<sup>th</sup>

**\*ALL NO'S REQUIRE A COMMENT AND ACTION PLAN WITH FOLLOW UP DATE\***

| MEETING   |         |    |  |     |    |
|---|---------|----|--|-----|----|
| Number in <b>ATTENDANCE</b>                       | # _____ |    | Was the <b>HALL Set Up</b> correctly?      | YES | NO |
| Was <b>AGENDA</b> followed correctly?             | YES     | NO | <b>OFFICIAL CORRESPONDENCE</b> read?       | YES | NO |
| Were <b>BILLS APPROVED</b> and <b>PAID</b> ?      | YES     | NO | <b>NEW MEMBER APPLICATIONS</b> read?       | YES | NO |
| <b>Reports of Standing and Special Committees</b> | YES     | NO | Was <b>BOARD OF OFFICERS REPORT</b> given? | YES | NO |

Comments on Meeting attended: \_\_\_\_\_

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| ADMINISTRATOR'S OFFICE AND BOARD OF OFFICERS   |                          |                               |  |   |   |
|--|--------------------------|-------------------------------|--|---|---|
| Were the <b>GENERAL &amp; OFFICER MINUTES</b> SIGNED?  | YES                      | NO                            | Were <b>EMAILS READ</b> and posted?  | YES   | NO  |
| Conducting <b>JOINT MEETINGS</b> (LOOM, WOTM) WITH MINUTES   | YES                      | NO                            | Did Trustees <b>APPROVE THE BILLS</b> ?  | YES   | NO  |
| Date of last <b>LCL TRANSMITTAL</b> (Lodge, Chapter, Legion – This is on the Lodge computer, ask to see)   | DATE<br>_____            |                               | Last <b>ENDOWMENT</b> Check # or Credit Card (Check stub to Moose Charities – due monthly)   | DATE  | CHECK #   |
| <b>SAFETY REPORT</b><br>-Submitted by 15 May?<br><br>-Any deficiency's noted?<br><br>-Deficiency's corrected?  | YES                      | NO                            | <b>HEART OF THE COMMUNITY</b><br>-Was the last HoC submitted on time?<br>-What was the last Grade? Circle One:<br>-When is the next HoC due? Circle One: | YES   | NO  |
|  | YES                      | NO                            |  | <b>Superior Excellent</b><br>May 15 <sup>th</sup><br>Aug 15 <sup>th</sup> | <b>Good No Grade</b><br>Nov 15 <sup>th</sup><br>Feb15 <sup>th</sup> |
|  | YES                      | NO                            |  |   |   |
| Does this lodge have legal gaming  | YES                      | NO                            | <b>MOOSE CHARITIES</b><br>-Per capita contributions to Moose Charities, (excluding Safe Surfin' and other pass-through contribution)                     | TOTAL   | PER CAPITA<br><br>_____<br><b>2019-20 Goal \$8.76</b>               |
| <b>ORIENTATION/ENROLLMENT</b><br>-last one conducted?<br>-# attended the last one?<br>-Were invitations mailed or emailed<br>-When is the next one scheduled | DATE<br>#<br>YES<br>DATE | _____<br>_____<br>NO<br>_____ | <b>WEBSITE UPDATED (Circle One)</b><br>-Lodge Information<br>-Social Quarters<br>-Newsletter posted  | Weekly<br>YES<br>YES<br>YES   | Monthly<br>NO<br>NO<br>NO   |



## DISTRICT PRESIDENT VISITATION REPORT

| MEMBERSHIP  |                             |                 |  |                                      |                            |
|---|-----------------------------|-----------------|--|--------------------------------------|----------------------------|
| <b>CAMPAIGN POSTED</b><br>-INTERNATIONAL<br>-STATE<br>-LODGE  | YES<br>YES<br>YES           | NO<br>NO<br>NO  | <b>PREFERRED MEMBERSHIP CHART</b><br>current? (sponsors of one or more applicants) | YES                                  | NO                         |
| Was at least <b>ONE NEW MEMBER</b> per month reported?  | YES                         | NO              | Last <b>MEMBERSHIP APPLICATION</b>   | DATE                                 | _____                      |
| Are the <b>ARREARS / DROPPED</b> list posted?   | YES                         | NO              | <b>RETENTION –</b><br>Percentage   | Expired                              | Renewed<br>_____<br>_____% |
| Are <b>RETENTION CALLS</b> being practiced?<br>-Last Retention Calls conducted?<br>-Next Retention Calls Scheduled? | YES<br><br>DATE<br><br>DATE | NO<br><br>_____ | Results and <b>EFFECTIVENESS</b> of the Retention Calls                            | <b>Feedback: Why Not re-joining:</b> |                            |
|   |                             |                 |  |                                      |                            |

| AED                               |  |      |       |            |                |                 |       |         |  |
|-----------------------------------|--|------|-------|------------|----------------|-----------------|-------|---------|--|
| <b>Lodge Active Members (AED)</b> |  | Goal | _____ | Difference | + / -<br>_____ | Expired         | _____ | Dropped |  |
| <b>Moose Legionnaires</b>         |  | %    | _____ | Goal       | _____          | # To Reach Goal |       |         |  |

| GENERAL   |          |            |  |      |    |
|---|----------|------------|--|------|----|
| <b>Lodge Appearance Overall - Inside/Outside</b>      | Superior | Excellence | Good   | Poor |    |
| Are <b>BLANK APPLICATIONS</b> available?              | YES      | NO         | Is the <b>OUTER DOOR</b> secure?   | YES  | NO |
| Verify <b>INCIDENT REPORT BOOK</b> is available?      | YES      | NO         | Are the <b>SOCIAL QUARTERS RULES AND PERMITS</b> posted in plain view?   | YES  | NO |
| <b>Association Raffle Tickets</b> If being sold       | #        |            |  |      |    |
| <b>BULLETIN BOARD</b> updated and information posted? | YES      | NO         | Are <b>MEMBERSHIP CARDS CHECKED</b>  | YES  | NO |
| Are all <b>LICENSES</b> current and posted?           | YES      | NO         | ABC, Health, BINGO, Social Quarters Permit, Fire & Business License as required by State and Local Jurisdictions |      |    |

**COMMENTS**

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***We the undersigned have found all the above information to be correct and accurate.***

District President / Officer \_\_\_\_\_ Date: \_\_\_\_\_

Lodge Representative / Title \_\_\_\_\_ Date: \_\_\_\_\_

(Copy to Territorial Manager, State President and Vice President)