

Hillsboro Elks Lodge no. 1862

Charity Policy and Procedures

Revision Date: 10/6/2026

I. Purpose and Intent - "Elks Care – Elks Share."

The purpose of this policy is to establish clear operational guardrails for evaluating funding requests, organizing fundraisers, disbursing funds, and managing Hillsboro Elks Lodge #1862 charitable resources.

The Lodge is committed to supporting the local Hillsboro and Washington County communities through impactful, accountable charitable giving while fulfilling our commitments to Oregon State Elks Association (OSEA) and Grand Lodge national programs.

II. Scope

This policy applies to all lodge-supported programs, charities, and designated non-operating funds. This includes youth activities, veterans services, independent charitable organizations, lodge-sponsored fundraisers, and non-operational budget line items.

III. Pillars of Support

The Hillsboro Elks Lodge prioritizes charitable engagement across three core pillars:

- **Veterans Services:** Local assistance, welcome home kits, mental health, suicide prevention initiatives, transitional housing support, and VA support.
- **Youth Programs:** Scholarships, Hoop Shoot, Drug Awareness, athletic/activity sponsorships, and local school partnerships.
- **Community Needs:** Programs and organizations that strengthen the local community, assist individuals and families facing hardship, and support the wellbeing of vulnerable or underserved populations.

IV. Eligibility and Funding Guidelines

Applicants must be a recognized 501(c)(3) non-profit, a local school, or a vetted direct local need within the Hillsboro/Washington County service area. Priority criteria:

- Alignment with the Lodge's Pillars of Support.
- Opportunities for direct, hands-on volunteer participation by Elks members.
- Intent of the organization to actively co-fundraise or participate in Lodge events.

Exclusions

Funding will not be considered for:

- Political campaigns, lobbying or political advocacy
- Religious advocacy or proselytizing programs
- Organizations outside the local community service area (except official Elks State/National programs, major disaster relief or with board approval).

V. Application and Approval Process (Starting before the next lodge year)

Step	Who	Action / Requirement	Timeline
1. Submission	Applicant/ Sponsor	Submits the official Lodge Charity Request Form	January
2. Presentation	Applicant/ Sponsor	Present request to Charity Committee during an open weekend session (all members welcome)	February
3. Review	Charity Committee	Vets eligibility, reviews impact, and scores requests against funding priorities.	Late Feb
4. Budget	BOD	Integrates recommended funding allocations into the draft annual Lodge budget.	Feb-March
5. Vote	Lodge Floor	Floor votes on the annual charitable budget per Elks governance rules.	April
6. Disbursement	Treasurer/ Bookkeeper	Funds are disbursed across the Lodge year as requirements are met. (No budget carryover).	April-March

VI. Annual Budgeting and Accounting

1. Annual Budget:

The Board of Directors allocates charity lines during the annual budget cycle in February/March. The final amount allocated to any charity or program is subject to adjustment by the Board and approval by a vote of the Lodge floor in April.

2. Disbursement of funds:

- a. Every monetary disbursement must be approved by a vote on the Lodge floor at a regular business meeting. These may be grouped by event.
- b. Reimbursements for fundraiser expenses require itemized receipts and signed vouchers.
- c. Unless authorized by the Board of Directors, final payment of a charity's annual budget allocation will occur only after all scheduled lodge fundraisers for that recipient are completed.

3. Disbursement calculation process:

Distribution amounts are calculated so that the Lodge's net contribution does not exceed the approved budget limit:

Funds Distributed = Gross Funds Raised + (Budget Allocated - Fundraising Expenses)

i. Scenario A: Under Budget (Profitable Fundraiser)

1. *Budget: \$5,000 | Fundraiser Expenses: \$3,000 | Funds Raised: \$9,000*
2. *Calculation: $\$9,000 + (\$5,000 - \$3,000) = \$11,000$ Distributed*
3. *Net Cost to Lodge: \$5,000 (Full budget utilized)*

ii. Scenario B: Over Budget (Expense Overrun)

1. *Budget: \$5,000 | Fundraiser Expenses: \$6,000 | Funds Raised: \$9,000*
2. *Calculation: $\$9,000 + (\$5,000 - \$6,000) = \$8,000$ Distributed*
3. *Net Cost to Lodge: \$5,000 (Overrun absorbed from gross proceeds)*

VII. Categories of Programs and Charities

- **Lodge Programs:** Internal initiatives receiving Lodge funds, fundraising support, or member services without standalone 501(c)(3) status.
 - *Examples:* Veterans Committee, Family Activities.
- **Lodge Funded Events/Programs:** Standard Elks state/national programs or designated local priorities that do not run independent fundraisers.
 - *Examples:* Hoop Shoot, Coat Closet, Vocational Scholarships, PCC Vocational Scholarship, Academic Scholarships, Americanism, Dictionary Project, Disaster Relief, Distressed Members Relief, Quilts of Comfort.
- **Lodge Supported Fundraisers (Officer-Led):** Events sponsored by the Lodge specifically to raise funds for designated causes.
 - *Examples:* Car Show, Harvest Festival.
- **Elks Charity (State/National):** Programs operated or supported by the Oregon State Elks Association (OSEA), Grand Lodge, or local Elks coalitions.
 - *Examples:* Elks National Foundation (ENF), Betty Hise Foundation, Meadowood Speech Camp, E.Y.E.S.

- **Independent Charities:** External 501(c)(3) organizations supported by the Lodge primarily through fundraising support, facility use, and some operating expense support.
 - *Examples:* Hillsboro K-9 Foundation, Rock n Rooms, Edwards Center, Holiday Giving Program.

VIII. Reporting Requirements

1. Automatic Reporting (Internal Events)

- All funds and donations from Lodge-supported events must process through the Lodge Bookkeeper to track revenues, expenses, and tax receipts.
- *Exceptions:* Direct-deposit joint initiatives (e.g., Meadowood Can Drive) or direct 501(c)(3) tax deductions permitted by the Board.
- Following major events, the Committee Chair, Lodge Sponsor, or Officer-in-Charge must present a report on the Lodge floor detailing:
 1. Date of fundraiser
 2. Attendance estimates
 3. Total funds raised and net proceeds
 4. Final disbursement destination

2. Independent Charity Reports

- **Event Report:** Following any event raising funds for an external partner, the sponsor must report the event date, attendance, and financial outcomes on the Lodge floor.
- **Annual Impact Report:** Every January, participating external charities (via their Lodge Sponsor) must submit a concise annual report to the Board of Directors detailing total funds received, fundraising expenses, and how those funds directly impacted the local community.