

**CALIFORNIA-HAWAII ELKS ASSOCIATION  
MID-TERM CONFERENCE MEETING AGENDA**

**HYATT REGENCY SANTA CLARA  
5101 GREAT AMERICA PARKWAY, SANTA CLARA, CA 95054  
NOVEMBER 7-8, 2025**

TIME

PAGE

**THURSDAY, NOVEMBER 6, 2025**

11am to 6pm Registration – *Hyatt Regency Santa Clara, Magnolia Room*

8:00 a.m. Golf Tournament Registration – *Sunnyvale Municipal Golf Course - Lunch to follow at the Sunnyvale Lodge No 2128*

2:00 p.m. CHEA Meetings Committee – *Hyatt Regency Santa Clara, Second Floor, Sonoma Room*

11am to 2pm Lunch available – *San Jose Lodge No 522*

**FRIDAY, NOVEMBER 7, 2025**

8am to 6pm Registration – *Hyatt Regency Santa Clara, Magnolia Room*

8:00 a.m. Association President’s meeting for AVP, DD, PAP & DL – *Hyatt Regency Santa Clara, Second Floor, Stevens Creek/Lafayette/San Tomas/Lawrence Rooms* 2

8:30 a.m. CHEA Investment Committee – *Hyatt Regency Santa Clara, Second Floor, Winchester Room*

9:30 a.m. CHEMPI Board of Trustees – *Hyatt Regency Santa Clara, Second Floor, Winchester Room*

10:30 a.m. CHEA Board of Trustees – *Hyatt Regency Santa Clara, Second Floor, Winchester Room*

11am to 2pm Lunch available – *San Jose Lodge No 522*

12:15 p.m. Current DDGERs Luncheon meeting with Sponsors – *Hyatt Regency Santa Clara, Second Floor, Cypress Room*

1:30 p.m. Exalted Rulers’ Conference – *Hyatt Regency Santa Clara, Grand Ballroom, Salons C-D-E-F* 3  
(AVP’s, ER’s, Committee Chairman, Loyal Knights, Lecturing Knights and Lodge Officers are to attend this session)

1:30 p.m. Leading Knights’ Conference – *Hyatt Regency Santa Clara, Grand Ballroom, Salons A & B* 4

1:30 p.m. Leading Knights’ & Officers Spouses’ Conference – *Hyatt Regency Santa Clara, Grand Ballroom, Salons G & H* 5  
Elkdom 101: All Welcome (Everything you wanted to know about Elkdom and were afraid to ask)

5:30 p.m. Dinner and Entertainment until 12 a.m. – *San Jose Lodge No 522* (Dinner served from 5:30 p.m. to 7:30 p.m.)

**SATURDAY, NOVEMBER 8, 2025**

8am to Noon Registration – *Hyatt Regency Santa Clara, Magnolia Room*

8:30 a.m. Lodge Officers and Committee Chairmen Seminar – *Hyatt Regency Santa Clara, Grand Ballroom, Salons G & H* 6  
(AVP’s, ER’s, Loyal Knights, Lecturing Knights, other Officers and Committee Chairmen are to attend this session)

8:30 a.m. Management Seminar – *Hyatt Regency Santa Clara, Grand Ballroom, Salons C-D-E-F* 7  
Leading Knights – Secretaries – Trustees  
(DD’s to attend this session)

12:15 p.m. CHEA Advisory Luncheon Meeting – *Hyatt Regency Santa Clara, Second Floor, Cypress Room*

1:30 p.m. Financial Reporting System, Secretary and CLMS2 Workshop – *Hyatt Regency Santa Clara, Second Floor* 8  
*Stevens Creek/Lafayette/San Tomas/Lawrence Rooms*

2:00 p.m. District Leaders’ Meetings – *Hyatt Regency Santa Clara, Second Floor, Winchester Room*

4:00 p.m. Elks National Foundation Mass – *Hyatt Regency Santa Clara, Sonoma Room*

5:30 p.m. ENF Cocktails, No Host – *Hyatt Regency Santa Clara, Evolution Courtyard / Grand Ballroom (Foyer)*

6:30 p.m. Elks National Foundation Dinner – *Hyatt Regency Santa Clara, Grand Ballroom, Salons C-D-E-F* 9

**SUNDAY, NOVEMBER 9, 2025**

8:30 am Elks Sunday Champagne Brunch until 1p.m. – *San Jose Lodge No 522*

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**NOVEMBER 7-8, 2025**

**ASSOCIATION PRESIDENT'S MEETING**

For Association Vice Presidents, District Deputies, Past Association Presidents and District Leaders

**HYATT REGENCY SANTA CLARA, SECOND FLOOR  
STEVENS CREEK/LAFAYETTE/SAN TOMAS/LAWRENCE ROOMS**

Friday, November 7, 2025

<u>TIME</u>		<u>SPEAKER</u>
8:00 a.m.	Call to Order	Scott Stephens
	Invocation	Nicole Sato
	Pledge of Allegiance	Marie Nunez
8:05 a.m.	Welcome	Scott Stephens
8:10 a.m.	Workshop discussion on Districts progress	Association Vice Presidents and other attendees
9:00 a.m.	Comments/Questions	Sponsors and Panel
9:15 a.m.	Benediction	Nicole Sato
	<b>ADJOURNMENT</b>	

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**HYATT REGENCY SANTA CLARA  
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**NOVEMBER 7-8, 2025**

**EXALTED RULERS' CONFERENCE**

Association Vice Presidents, Exalted Rulers, Committee Chairmen, Loyal Knights, Lecturing Knights and Lodge Officers are to attend this session.

HYATT REGENCY SANTA CLARA, GRAND BALLROOM, SALONS C-D-E-F

Friday, November 7, 2025

<u>TIME</u>		<u>SPEAKER</u>
1:30 p.m.	Call to Order	Scott Stephens
	Invocation	Nicole Sato
	Pledge of Allegiance	Marie Nunez
1:35 p.m.	Welcome to Mid-Term	Mita Dey, Exalted Ruler Santa Clara Lodge No. 2347
1:40 p.m.	Americanism	Larry Perez
1:48 p.m.	President's Achievement Awards Program	Jamie Jasso
1:56 p.m.	National Veterans Service	John Hardman/Daniel "Dan" Baccelliere
2:04 p.m.	Government Relations	Alyssa Santos/Kris Picard
2:19 p.m.	Membership/Orientation	James Warrick/Ben Ortega
2:27 p.m.	Public Relations & G.L.	Dennis Hunter/Patrick Akes
2:42 p.m.	Ritual Contest	Nancy Kulinski/Greg Carlson
2:50 p.m.	Ritual Training	Kenneth Powalisz/John Albrecht
2:58 p.m.	Insurance & Safety	Robert Beck
3:15 p.m.	Officers Training	Betty McClellan
3:30 p.m.	Comments/Questions	Sponsors and Panel
3:45 p.m.	Benediction	Nicole Sato
	<b>ADJOURNMENT</b>	

**CALIFORNIA-HAWAII ELKS ASSOCIATION  
MID-TERM CONFERENCE MEETING AGENDA**

**HYATT REGENCY SANTA CLARA  
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**NOVEMBER 7-8, 2025**

**LEADING KNIGHTS' CONFERENCE**

HYATT REGENCY SANTA CLARA, GRAND BALLROOM, SALONS A & B

Friday, November 7, 2025

<u>TIME</u>		<u>SPEAKER</u>
1:30 p.m.	Call to Order	Lynn Glick
	Invocation	Tom Dasher
	Pledge of Allegiance	Shirley Bierman
1:43 p.m.	Welcome to Mid-Term	Matt Dutra, Leading Knight Santa Clara Lodge No. 2347
1:47 p.m.	CHEMPI Staff Presentation	Jocelyn Bishop, Speech-Language Pathologist
1:54 p.m.	Piggy Bank	Robert "Bob" Farrens/Blanche Jorge
2:01 p.m.	BLT Legacy Trust Fund	Robyn Sembenini/Linda Valenty
2:08 p.m.	Major Project	Barbara Knox
2:15 p.m.	Elks National Foundation	Jere M. Williams/Steve Graham
2:22 p.m.	Lodge Activities	Rudy Guerra
2:29 p.m.	Youth/Soccer Activities	Jim McCloskey/Adrienne Castaneda
2:36 p.m.	Drug Awareness	Susan Good/Patricia "Patty" Hamilton
2:43 p.m.	Member Lapsation	James Warrick/Ben Ortega
2:58 p.m.	Public Relations & G.L.	Dennis Hunter/Patrick Akes
3:05 p.m.	CHEA Convention (Palm Springs)	Barbara Knox
3:12 p.m.	Blue Coats	Rick Adams
3:17 p.m.	Grand Lodge Convention (Chicago, IL)	Cliff Wadley
3:24 p.m.	Ritual Contest & G.L.	Nancy Kulinski/Greg Carlson
3:31 p.m.	Ritual Training	Kenneth Powalisz/John Albrecht
3:38 p.m.	Auditing and Accounting	Lesley Dale/Larry Nelson
3:45 p.m.	Questions and Answers	Lynn Glick and panel
4:00 p.m.	Benediction	Tom Dasher

**ADJOURNMENT**

**CALIFORNIA-HAWAII ELKS ASSOCIATION  
MID-TERM CONFERENCE MEETING AGENDA**

**HYATT REGENCY SANTA CLARA  
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**NOVEMBER 7-8, 2025**

**LEADING KNIGHTS' AND OFFICERS SPOUSES' CONFERENCE  
ELKDOM 101: ALL WELCOME  
EVERYTHING YOU WANTED TO KNOW ABOUT ELKDOM AND WERE AFRAID TO ASK**

HYATT REGENCY SANTA CLARA, GRAND BALLROOM, SALONS G & H

Friday, November 7, 2025

<u>TIME</u>		<u>SPEAKER</u>
1:30 p.m.	Call to Order	Jeff Glick
	Invocation	Colleen Dasher
	Pledge of Allegiance	Ric Bierman
1:40 p.m.	Welcome to Mid-Term	Sribash Dey
1:45 p.m.	Introductions	Jeff Glick
1:55 p.m.	CHEA 2026 Convention (Palm Springs) Visitations & Protocol	Barbara Knox
2:05 p.m.	2026 GL Convention (Chicago, IL)	Bonnie Wadley
2:15 p.m.	Visitations & Protocol	Debra Mello
2:35 p.m.	Major Project	Betty McClellan
2:45 p.m.	CHEMPI Staff Presentation	Jocelyn Bishop, Speech-Language Pathologist
2:55 p.m.	Piggy Bank	Diane Farrens
3:05 p.m.	BLT Legacy Giving	Joe Tato
3:15 p.m.	Elks National Foundation	Geri Williams
3:25 p.m.	Comments/Questions	PGER's Spouses & Panel
3:35 p.m.	Closing Remarks	Jeff Glick
	Benediction	Colleen Dasher
	<b>ADJOURNMENT</b>	Jeff Glick

**CALIFORNIA-HAWAII ELKS ASSOCIATION  
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**HYATT REGENCY SANTA CLARA  
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**NOVEMBER 7-8, 2025**

**LODGE OFFICERS', COMMITTEE CHAIRMEN SEMINAR**

Association Vice Presidents, Exalted Rulers, Loyal Knights, Lecturing Knights,  
Lodge Officers and Committee Chairmen attending

HYATT REGENCY SANTA CLARA, GRAND BALLROOM, SALONS G & H

Saturday, November 8, 2025

<u>TIME</u>		<u>SPEAKER</u>
8:30 a.m.	Call to Order	Scott Stephens
	Invocation	Nicole Sato
	Pledge of Allegiance	Marie Nunez
8:35 a.m.	Major Project	
	A. Therapist Perspective	Jocelyn Bishop, SLP
	B. Piggy Bank	Robert "Bob" Farrens/Blanche Jorge
	C. BLT Legacy Giving	Robyn Sembenini/Linda Valenty
	D. Recap and Questions	Barbara Knox
9:00 a.m.	Elks National Foundation and Funded Programs	
	A. Drug Awareness	Susan Good/Patricia "Patty" Hamilton
	B. Hoop Shoot & G.L.	David Martin/Leslie Fisher/Brenda Shaw
	C. National Foundation Grants	Steve Graham
	D. National Veterans Service	John Hardman/Daniel Baccelliere
	E. Scholarships	Rich Wallace/ Harvey S. Boelts
	F. Scouting	Larry Ryan
	G. Youth/Soccer Activities	Jim McCloskey/Adrienne Castaneda
	H. Recap and Questions	Jere M. Williams/Steve Graham
10:30 a.m.	Membership Management Control Team	
	A. Lodge Activities	Rudy Guerra
	B. Membership & Incentives (Recruitment)	James Warrick/Ben Ortega
	C. Orientation (Retention)	James Warrick/Ben Ortega
	D. Public Relations & G.L.	Dennis Hunter/ Patrick Akers
	E. Recap and Questions	James Warrick/Ben Ortega
11:40 a.m.	Comments/Questions	Sponsors and Panel
11:50 a.m.	Benediction	Nicole Sato
	<b>ADJOURNMENT</b>	

**CALIFORNIA-HAWAII ELKS ASSOCIATION  
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**HYATT REGENCY SANTA CLARA  
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**NOVEMBER 7-8, 2025**

**MANAGEMENT SEMINAR**

Leading Knights, Secretaries, Trustees and DDGERs in Attendance

HYATT REGENCY SANTA CLARA, GRAND BALLROOM, SALONS C-D-E-F

Saturday, November 8, 2025

<u>TIME</u>		<u>SPEAKER</u>
8:30 a.m.	Call to Order	Robert Lenk
	Invocation	Russell Lumpkin
	Pledge of Allegiance	Lyle Personette
8:35 a.m.	Opening Remarks	Robert Lenk
8:40 a.m.	Business Practices Cost of Sales UBI-Non Members / Outside Parties Illegal Gambling	Rochelle Zenger David Wells David Wells
9:30 a.m.	Accounting Consultants Financial Reporting System (FRS) Overhead Allocation Restricted Funds	Debra Mello Lesley Dale/Larry Nelson Lesley Dale/Larry Nelson
10:20 a.m.	Grand Lodge Billing Program	Nicole Sato
10:30 a.m.	Grand Lodge Judiciary	Melvin R. Keeter
10:45 a.m.	Insurance and Safety	Robert Beck
11:30 a.m.	Comments/Questions	Sponsors and Panel
11:45 a.m.	Benediction	Russell Lumpkin

**ADJOURNMENT**

**\*NOTE:** Questions are encouraged at the end of each presentation. Please stand and speak loudly, or submit written questions to the moderator.

This is your seminar – make it constructive!

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**FINANCIAL REPORTING SYSTEM, SECRETARY AND CLMS2 WORKSHOP**

HYATT REGENCY SANTA CLARA, SECOND FLOOR  
STEVENS CREEK/LAFAYETTE/SAN TOMAS /LAWRENCE ROOMS

Saturday, November 8, 2025

<u>TIME</u>		<u>SPEAKER</u>
1:30 p.m.	Welcome	Debra Mello Grand Lodge F.R.S. Coordinator
	Invocation	Diane Farrens, CHEA Secretary
	Pledge of Allegiance	Diane Farrens, CHEA Secretary
	Financial Reporting System (F.R.S.)	Debra Mello Grand Lodge F.R.S. Coordinator
	Membership Billing System	James Warrick, Membership
	Secretaries Workshop	Diane Farrens, CHEA Secretary
	CHEA CLMS2 Workshop	Robert Brotherton, Chairman
	Comments/Questions	Sponsors and Panel
	Benediction	Diane Farrens, CHEA Secretary
	<b>ADJOURNMENT</b>	

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**ELKS NATIONAL FOUNDATION DINNER**

HYATT REGENCY SANTA CLARA, GRAND BALLROOM, SALONS C-D-E-F

Saturday, November 8, 2025

<u>TIME</u>		<u>SPEAKER</u>
6:30 p.m.	Welcome	Scott Stephens
6:35 p.m.	Invocation	Nicole Sato
	Pledge of Allegiance	Marie Nunez
6:40 p.m.	Introductions	Scott Stephens
6:45 p.m.	Dinner	
7:45 p.m.	Guest Speaker	Tim Jaeger, Past Chairman BOGT Presented By Honorable Louis J. Grillo, PGER
8:00 p.m.	ENF Presentation	Special Presentation To Be Announced By Honorable Robert L. Duitsman, PGER
8:05 p.m.	National Foundation Report by Association Vice Presidents	Scott Stephens/ Kealoha Jenkins
8:30 p.m.	Benediction	Nicole Sato
	<b>ADJOURNMENT</b>	