

## CONDUCTING AN INSPECTION

Arrive smiling and upbeat. Greet all the Sisters and speak with each one of them, if at all possible.

### **Secretary's Books:**

When reviewing the Secretary's book, look for the following.

1. Are there meetings each month, as the Bylaws require? Do they have, at least, one meeting each month?
2. Is there a Treasurer's Report for each meeting?
3. Is there an audit each quarter and is it entered in the Minutes that it was read and approved by the members?
4. Are all pages that have pasted in the bound book signed by the Trustees?
5. Is there a roll call book?

### **Treasurer's Books:**

When reviewing the Treasurer's books, please check that the receipts and disbursements are being kept separately (either top and bottom of the page, or on different pages) for each month. They should have a column showing the amount received or disbursed, and then the breakdown to the side of the accounts used.

The books should be signed by the Trustees, at the time of the audit. You will need to see the checkbook, journal and receipt book. If you have questions, ask the Treasurer to explain.

### **President:**

You must see the current bond. The current bond is good until August 2009. The cost for the bond is \$10.00 for the first \$10,000.00 worth of coverage. The information to obtain the bond was in their Treasurer's kit for 2010. If they have sent for the new bond, but it has not yet been received, there will be an outstanding check in the Treasurer's books. Ask the President to send you a copy of the bond when she receives it.

Ask the President the necessary questions and complete the Inspection Form as much as possible, before the inspection. You should take notes during the meeting, so that when you are asked to speak, you can address the areas where information needs to be added, or programs not discussed can be touched on.

Be cordial, thankful for the gifts, refreshments, etc. offered by the members. You should have a little gift for the President and if you have seen something being done incorrectly (i.e., crossing between the altar and the President outside of the Ritual direction), you need to bring it to their attention nicely. Ask if there are any questions you can answer, and if you don't know the answer, tell them you will find out and get back to them.

Keep your Bylaws and Demeter's Manual handy to look up any necessary answers, and encourage them to do the same before seeking outside information. Please emphasize that they should try to get their answers from District or Department, before calling National. Many problems and questions could, and should be addressed, without the necessity of calling or writing to National. We should have the first opportunity to solve our own problems and answer any questions they may have. Most of the time, National will just refer them back to us for action anyway.

Take the latest blackout sheets with you (they can be found on line at [www.lavfwca.org](http://www.lavfwca.org) ) so you know what programs they have, and have not, reported in, and what quotas or donations are still outstanding.

When you make out the report, be honest. We cannot know of problems if we are not told. If you feel you need to make a return visit, please indicate that on your report along with the reasons you deem it necessary. There are no consequences from adverse information on the inspection form. It just keeps us aware of potential problems and allows the Department President to decide if any assistance is needed to correct the deficiencies.

Leave a copy of the report with the President, keep a copy for yourself and send the original to the Department office as soon after the inspection as possible. If you have something really private you want to say, put a cover letter on the inspection form when you send it to Department. It will be kept confidential.

In seeking mileage reimbursement, you can combine visits so I am writing a couple of larger checks as opposed to 15 small ones.