

# GRAND LODGE

*Ancient, Free and Accepted*

## Masons

*Of the State of Missouri*

### Wardens and Masters Training Workbook



2022 Edition



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# INTRODUCTION

Our most humble thanks to those who have supported and contributed to the labor of producing and developing this content, with special emphasis to Most Worshipful Brothers Ty G. Treutelaar, Barry V. Cundiff, Stanton T. Brown II, Robert T. Thomas and Jon B. Broyles, as well as the Grand Lodge officers, the Membership committee, Public Relations committee, and members of the Masonic Education committee past, as well as the numerous brothers who served as resources and produced content as asked.

## PROGRAM GOALS AND MISSION

*To create engaged, energized, active brothers for Missouri Lodges who grasp fundamental Lodge operations, leadership skills, Masonic protocols, and making the most of the Masonic experience for brothers within their Lodge and the jurisdiction of the Grand Lodge of Missouri through engagement and the practice of the Craft.*

### Masonic Education Committee 2021-2022

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Joshua Thompson, P.M.

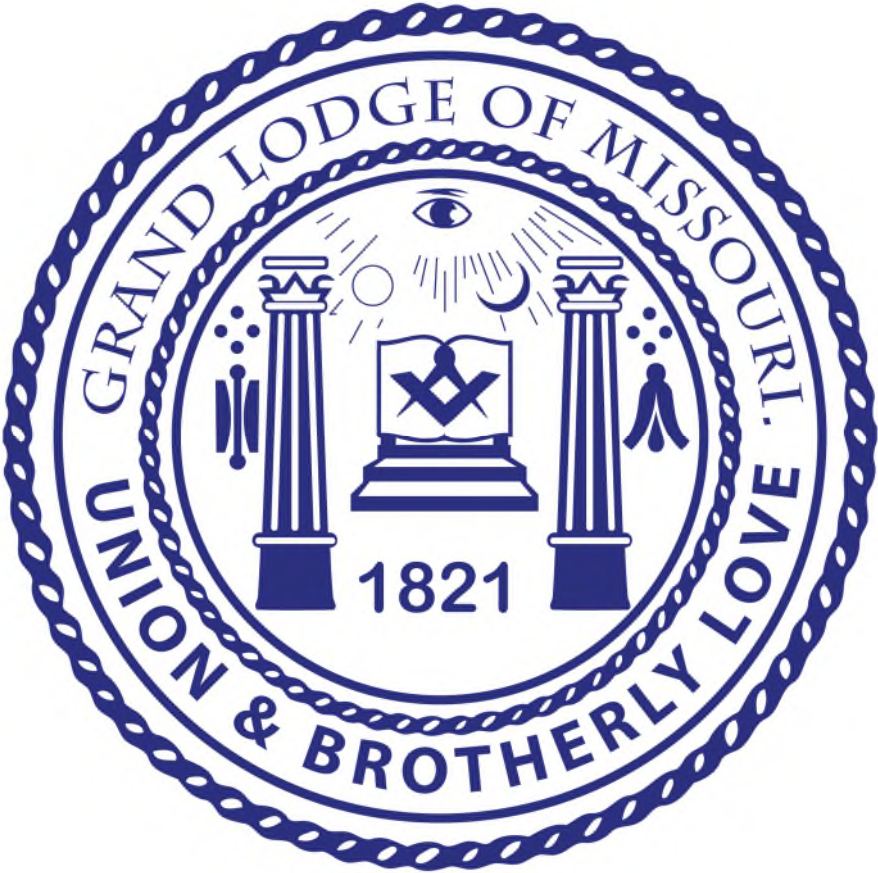
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# Module 1: Leadership 101 & Officer Roles







## What come you here to do?

Welcome to the Grand Lodge of Missouri Wardens and Masters Training program. The experience that you'll participate in is one that has been curated and developed with you and the needs of Missouri Masonry in mind. We hope that your excitement to lead, learn, and honor the Craft's traditions is as strong as ours.

Before we begin, we want to encourage you to take a moment to think deeply and directly- Why are YOU here?

Why are you an officer?

What do you want to take away for this experience, what's one skill set, concept, or question you want to have answered?

## Themes – Setting a Course

Setting a theme for the year can help build a tone, coordinate programming, and spark brothers to action. Below are several themes along with brief commentary on what they highlighted.

“Whence Came You?”

“Noscre, Audre, Velle, Tacere?”

“Honoring our Past, Looking toward the Future”

“Give the Gift, Guard the Gate”

“Growing Masonry in the Community,”

“In Service of Man”

“For a Thousand Years More...”

“Excelsior! Onward in understanding the Craft”

“Virtue, Love, & Silence”

“Silence & Circumspection”

“Fraternity, Charity, Industry”

“A Temple of Living Stones”

“Sit Lux Et Lux Fuit”

“Completing the 3<sup>rd</sup> Pillar”

“Onward from the Quarries”

“Ritual and Symbols into Action”

“Honoring our Heritage”

“How will you be tried?”

**What potential themes come to mind for you?**



# Mission Statements

A mission statement acts like a navigational beacon and helps chart a course for the Lodge to meet goals, and more importantly solidify its culture and experience

What key things do you think need to be a part of a Lodge's mission statement?  
Consider your own Lodge!

***Now Combine those thoughts and create a Mission Statement for your Lodge.***



## SMART Goals

# GOALS- Without them what are we doing?

The success your Lodge achieves comes through planning and effective understanding of what's going to occur. When brothers set goals properly, achieving them becomes second nature and allows the Lodge to succeed.

**S-**

**M-**

**A-**

**R-**

**T-**

*Now take what we just discussed and write 3 SMART GOALS*

- 1.)
- 2.)
- 3.)

## Finding the Right Appointments

Becoming a part of the leadership team for a Lodge isn't just for those carrying titles and officers, although those are often the prominent roles with think about. When time comes to fill offices, make sure you're considering the right person with the right fit for the task at hand as well as future roles and responsibilities that may fall on them.

Additionally, it's worth noting that many Lodges face challenges in finding Brothers to fill various roles. It is crucial to have honest discussions about commitments and responsibility when these situations arise and to make the best decision for strong leadership.

*Keep the following in mind:*

- Not every Brother is a good fit, made for active leadership, or wants to be in the Officer line. Realize this.
- The year isn't just about the Master succeeding, it's about the Lodge succeeding, and continuing (or establishing) success and strength in the Lodge for the future.
- Consider a Brother's current situation in life, his work obligations, family commitments, and other masonic roles. It may not be the right time now, and a future election/appointment may better fit the lodge and that brother.
- Be honest with potential appointments about the TRUE time commitments and expectations- **It's not just two meetings a month from 6pm-9pm.**

### What's important to you in an appointment?



# Module 1: Notes







# Module 2: Lodge Operational Management





## Committees Overview

### **Why Committees? - *What do they really do?***

The backbone of many Lodge efforts or operations begins, more often than not, with Committees and their efforts. Committees fill a vital role and help to accomplish tasks, organize certain events, and be the catalyst for action as may happen. Their flexibility allows for effort outside the Lodge room and elsewhere while accomplishing their assigned duty.

**Standing Committees** are those laid out by By-laws and include:

- **Budget Committee**- works to compile a budget for Lodge operations
- **Audit Committee**- reviews & audits the Lodge books for good stewardship
- **Grievance Committee**- reviews complaints brought forth against a Brother
- **Delinquent Dues Committee**- works to encourage payment of dues from brothers

**Select Committees** can cover all manner of things and events as they help to review actions, plan events, or complete other tasks

They can include:

Mentoring Committee	Education Committee
Widows Dinner Committee	Sickness & Distress Committee
Public Relations Committee	Fundraiser Committee
Youth Events Committee	Community Service Committee
Temple Renovation Committee	Standing Investigating Committee

And the list goes on and on.....

## **Committees/Additional Roles required by Grand Lodge By-Laws**

**Audit Committee-** No less than 3 members appointed by the Master upon installation. Per Section 9.035

**Budget committee-** Consists of the Master, Secretary, Treasurer, & 2 Master Masons of the Lodge appointed by the Master upon installation.

-No later than the 2<sup>nd</sup> Stated Communication after the installation of the Master, the Committee should report a budget of the revenues anticipated to be available for operation of the Lodge for the next year, and of the itemized expenditures required, appropriated, or recommended for the period. This does include per capita tax. Per Sections 9.040 & 9.050

**Grievance Committee-** Appointed by the Master upon installation.

To consist of not less than 3 nor more than 5 Past Masters in good standing and he shall additionally designate one as chairman. If a sufficient number of active resident Past Masters exist Master Masons in good standing may be appointed. The Junior Warden may not be a member of this committee. Per Section 29.010

**Delinquent Dues Committee-** Appointed by the Master upon installation.

To consist of not less than 3 members. The Secretary shall when sending notice to delinquent members in accordance with the bylaws furnish the Committee with the names and addresses of the members to whom notices were sent. They will endeavor to persuade the delinquent members to pay their dues or determine if a financial need is present for remittance. Per Section 9.160

### **OTHER OFFICERS**

**Masonic Home Representative-** Appointed by the Master to receive and communicate information from the Lodge to the Masonic Home of Missouri. Per Section 9.170

**Lodge Education Officer-** Appointed by the Master to at his direction develop and carry out plans for the continuing Masonic Education of all members. Subject to Master's approval and applicable by-laws such officer can select, organize, and direct a Lodge Education Committee to aid him in his work. Per Section 9.180

**\*See Appendix I for Lodge Committee Worksheet\***

## Lodge Budget Best Practices

Developing a dynamic budget that meets the expectations of the craft as well as the Lodge's operational needs can present quite a challenge if done without much review or regard.

**When preparing material for the budget consider:**

- **Communication expectations & Lodge Culture**
  - How formal are meetings? What are meal/refreshment expectations?
- **Lodge's appetite for social or charitable activities and events**
  - Does the Lodge sponsor a Masonic Youth group, scholarships, host charitable events?
  - How frequent & in what ways are fellowship encouraged
- **Special events on the horizon**
  - Lodge Anniversaries, Large Community Celebrations
- **Building ownership or rental/occupancy dynamics**
  - Owning and Renting present totally different financial perspectives
- **Member intake/retention**
  - What are the typical number of candidates vs. NPD/Deaths

**These areas of focus are just setting a baseline as many other factors can come into play.**

***What other factors do you think need to be considered in a Budget?***

**\*See Appendix II for Budget Examples\***

# Audit Best Practices

An effective audit of the Lodge's books ensures good stewardship of Lodge resources and serves as a potential buffer to stave off the unlikely but possible existence of impropriety.

*An audit must occur yearly (in accordance with Grand Lodge by-laws) but can also occur at the order of the Grand Lodge at any time. The Committee charged with overseeing the audit is outlined by Section 9.035 of the Grand Lodge by-laws, YET many Lodges may go further and stipulate specific officers to serve on it. **IT IS IMPORTANT TO NOTE THAT THE TREASURER & SECRETARY SHOULD NOT BE INVOLVED IN THE COMMITTEE BUT SHOULD BE AVAILABLE TO ANSWER QUESTIONS.***

**KEEP IN MIND-The Committee should examine ALL BOOKS, i.e. Lodge, Temple association, or any other Fund/Committee that has its own accounts.**

## **What to Gather:**

- Last Audited Financial Statement & Report
- Bank & Financial Fund statement, to include copies of checks, duplicate deposit slips, certificate of deposit statements, paid bills, remittance records, etc.... for the Lodge, Trustees, Temple Association or Committee that holds or disperse money.
- Account books & Ledgers kept by Treasurer (whether a check register, cash book, spreadsheet, etc. as may be used to keep records and summarize financial data which shows the cash receipts and disbursements in "reasonable" detail.
- Financial records kept by Secretary (this includes the Minutes book, annual report to Grand Lodge, detail of receipts, authorization of payments-such as a voucher & transmittal of funds to treasurer.)

### **So now that you've gathered everything- What next?**

1. Summarize cash receipts deposited into checking accounts & checks written during the audited period.
2. Reconcile checking account as of audit date using amounts summarized in step 1.
3. Draft a Trial Balance Worksheet of lodge accounts as of the date of the last audit
4. Summarize activity in all other accounts on a Trial Balance Worksheet
5. For each Asset & Liability Account, complete a trial balance worksheet by adding amounts to the "Receipts" column and deducting amounts in the "Checks/Transfers" column from the beginning balance of the account, entering the resulting amount in the ending balance column
6. The Ending Balance in the Net Worth Column of the Trial Balance Worksheet should total both across and down.
7. Review the Annual Report (Return) to Grand Lodge, with focus on total Lodge membership and relating the same to cash summary of dues received.
8. There may be separate accounts for Trustees, the Temple Association, or certain Committees. Obtain records from those responsible.

### **Now Consider**

- Who has authorization to sign checks, transfer funds, etc.?
- Are all assets and liabilities accounted for & included in the Trial Balance?
- Are funds being administered in accordance with the By-laws & Minutes
- Has there been appropriate authorization for all important transactions reflected in the book of accounts?

### **Making the Report to the Lodge**

- Prepare a written report outlining the audit and review that occurred, as well as conclusions reached, & signed by all members of the Committee
- Prepare a Balance Sheet and Statement of Income & Net Worth as of the audit date using the gathered information
- The Committee's working papers, showing tests done, etc. should be retained by the Secretary and passed to the next Committee.
  - All working papers should be signed off on by the Committee members

# The Importance of a Calendar & ACTIVE Strategic Planning

- Planning a year or considering a strategic plan takes forethought and time.
  - Effort needs to be made to consider the vision for the Lodges future, its culture, and goals
  - Additionally, consideration should be given to financial standing, future expenses, and membership growth and retraction.
- Strategic planning or even laying out a simpler future calendar should involve multiple stakeholders and those who'll be a part of the process or leadership evolution over time.
- Events like installations, elections will generally have dates or timeframes set by your by-laws but there also may be local traditions or activities your lodge participates in yearly or on a particular cycle

The Grand Lodge encourages Lodges to implement at the very least a 3-year plan as part of the Grand Lodge Achievement Award Program and it is necessary it be endorsed by the 3 principal officers. Your District Deputy Grand Master will want to see this document and may offer comments on it during his visit.

**\*See Appendix III for a 3-year plan Examples\***



## What's a Masonic Offense?

In honest terms, the term “masonic offense” is extremely broad and can constitute multiple things. It includes but is not limited to:

- Automatic expulsion-felony acts
- Knowing or Purposeful Violation of Law
- General Misconduct
- Disobedience to Authority
- Disobedience to Process
- Misrepresentation
- Withholding information
- Fraud
- Improper use of Masonic names and emblems

### Who can bring Charges?

Any member of a Lodge may prefer charges.

### Who can be brought up on Charges?

- Any Missouri Mason
- A sojourning Mason, while in Missouri
- Members of Lodges of other States
- Jurisdictions of other states' reciprocity provisions

*See Sections 28.100-28.130*

### Punishments levied can include:

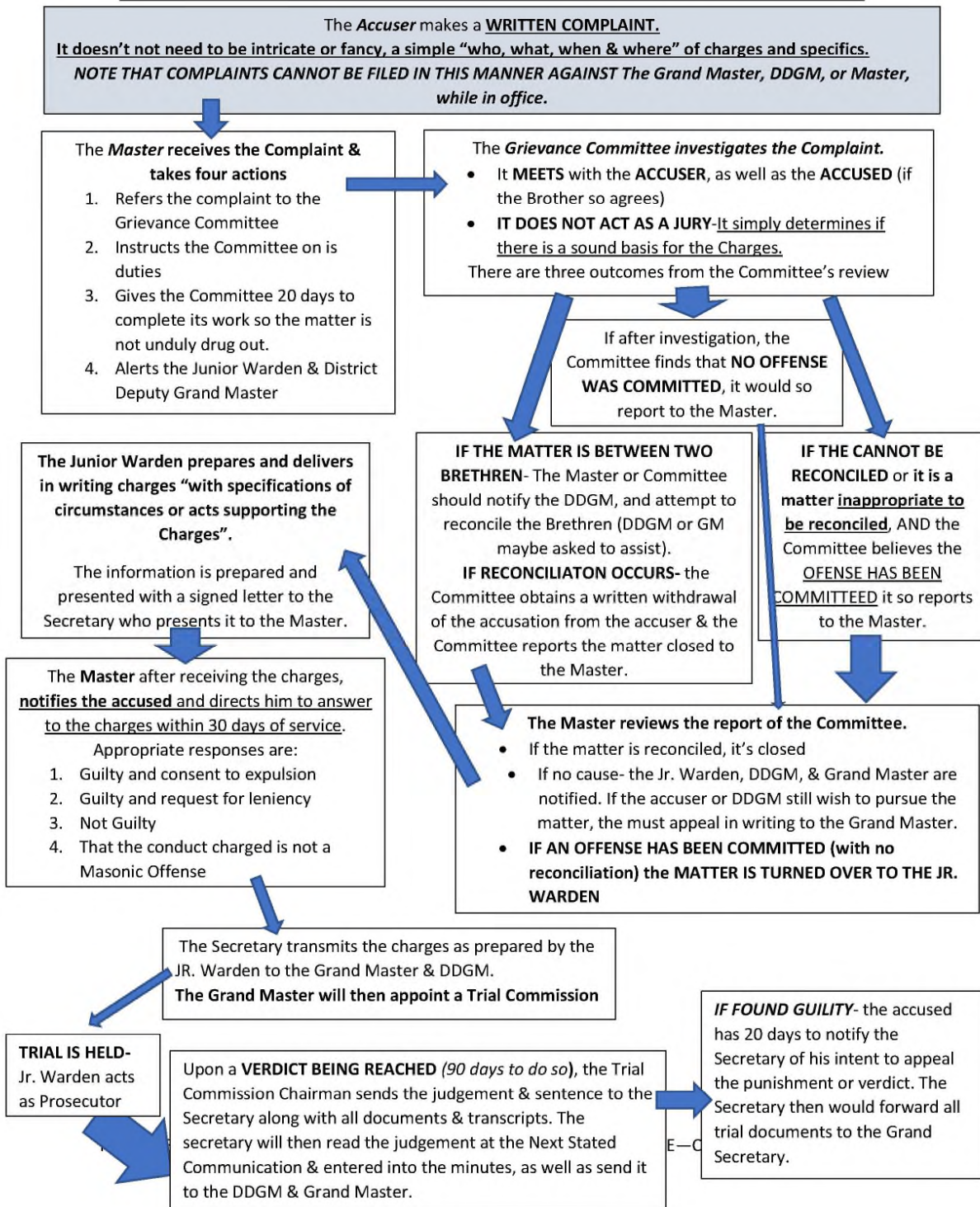
1. Reprimand
2. Suspension for a *definite* period of time
3. Suspension for an *indefinite* period of time
4. Expulsion

*See Sections 30.130*

## IMPORTANT REMINDER

Keep in mind that Masonic Charges and a Trial are no trivial matter. They are serious and handled as such. Accusations and the preferment of Charges should be a step taken only when necessary, it should not be a tool to force improper agendas or harass a Brother for some reason. The expense and time involved with such trials can cause a great drain on the Lodge involved and harm the membership as well through divisive interactions.

# The Path of Masonic Charges



# Petitions, Petitions, Petitions

While much of the traditional petitioning paperwork and process can now shift in some ways to a digital process, it's important we realize what petitions meet various needs and details that should accompany them.

**FORM 1-2-3**

- Should be accompanied by Petition for Affiliation or for Multiple Membership

**Petition for Reinstatement**

Used for Brothers suspended for NPD- LONGER than 12 months

**Petition for Affiliation**

- Used for Brothers seeking to move membership from one Lodge to another
- Requires accompanying Grand Lodge Form 1-2-3



**PETITION FOR THE DEGREES—MISSOURI A.F. & A.M.**

The petitioner must be accompanied by a fee of \$\_\_\_\_\_

Lodge No. \_\_\_\_\_, located at \_\_\_\_\_, Missouri.

**I, the Petitioner, represent:**  
That, although by regular initiation and installation by necessary members, I have and voluntarily offer myself as a candidate for the initiation of Freemasonry, that I am prepared to make this application from a favorable opinion concerning the history of the Fraternity, and a desire for knowledge, and a sincere wish to be of service to my fellow men. I ask a favor before to the use of Living and True God.

**1. FULL NAME:** \_\_\_\_\_ **HOME PHONE:** \_\_\_\_\_

**2. DATE AND PLACE OF BIRTH:** \_\_\_\_\_

**3. RESIDENCY ADDRESS:** \_\_\_\_\_

**MAILING ADDRESS:** \_\_\_\_\_

**4. FREQUENCY OF PASTOR:** \_\_\_\_\_ **EMPLOYER:** \_\_\_\_\_

**5. OCCUPATION FOR THE PAST TEN YEARS:** \_\_\_\_\_

**6. ARE YOU OR WERE YOU A MEMBER OF THE ARMED FORCES?**  Yes  No

**7. RESUME FOR PAST TEN YEARS:** \_\_\_\_\_

**8. Have you petitioned any Masonic Lodge to become a member of the same? YES \_\_\_\_\_ NO \_\_\_\_\_**

**9. Has an admission, complaint, or information ever been made, returned, or issued against you, or have you ever been charged with, or convicted of, any crime, whether a misdemeanor or felony? YES \_\_\_\_\_ NO \_\_\_\_\_**

**Petition for the Degrees**

- Should be accompanied by Petition Fee
- Used for Non-Masons as well as Clandestine Masons

**Insure:**

- The Petitioner lists 2 references
- That the petition is signed by 2 Brothers in good standing (one must be a member of the Lodge being petitioned.)
- The petition fee accompanies the form

**PETITIONER'S AND NOTARY IN SPACES BELOW SIGN LOOSE CAREFULLY**

MONTH, DAY AND YEAR PETITION PRESENTED: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ DATE ELECTED: \_\_\_\_\_

Committee on Investigation: Bro. Accepted: \_\_\_\_\_ Report Date: \_\_\_\_\_

Chairman: \_\_\_\_\_ Forewarned:  Unforewarned:  Signature: \_\_\_\_\_

Member: \_\_\_\_\_ Forewarned:  Unforewarned:  Signature: \_\_\_\_\_

Member: \_\_\_\_\_ Forewarned:  Unforewarned:  Signature: \_\_\_\_\_

Degree and Examinations Dates

E.A.	Examination	Date:	_____
F.C.	Examination	Date:	_____
M.M.	Examination	Date:	_____

Death of Member

\_\_\_\_\_

**THE GRAND LODGE, A.F. & A.M. OF MISSOURI**

2014 \_\_\_\_\_ Date \_\_\_\_\_ MOGA - Form 4

APPLICATION FOR CERTIFICATE OF WITHDRAWAL AS A MULTIPLE MEMBER

APPLICATION FOR DIMIT FROM LODGE OF "ORIGINAL" MEMBERSHIP

To the Worshipful Master, Wardens and Brethren of Lodge No. \_\_\_\_\_, located at \_\_\_\_\_

My dues are fully paid. I am not indebted in an official capacity. I am now under charges.

I hereby apply for a certificate to:

terminate my Multiple Membership in your Lodge or

terminate this Lodge as my "Original" or "Home", and hereafter design as Lodge No. \_\_\_\_\_, located at \_\_\_\_\_ as the Lodge of my "Original" or "Parent" Membership.

Full Signature of Member: \_\_\_\_\_

Complete Mailing Address: \_\_\_\_\_

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**NOTICE OF WITHDRAWAL OF MULTIPLE MEMBERSHIP** MOGA - Form 5

(To be filled out by the Lodge Secretary. Please notify the Grand Secretary.)

Date: \_\_\_\_\_

Lodge No. \_\_\_\_\_ located at \_\_\_\_\_

THIS IS TO CERTIFY that this Lodge, at the Stated Communication held on \_\_\_\_\_, 20\_\_\_\_, granted Brother \_\_\_\_\_ the Certification of Withdrawal of Multiple Membership. The Brother holds Masonic Membership in the following Lodges:

Lodge No. \_\_\_\_\_ located at \_\_\_\_\_

Lodge No. \_\_\_\_\_ located at \_\_\_\_\_

Lodge No. \_\_\_\_\_ located at \_\_\_\_\_

Seal \_\_\_\_\_ Signature of Secretary \_\_\_\_\_

---

**DIMIT** MOGA - Form 6

(To be filled out by the Lodge Secretary. Please notify the Grand Secretary.)

Date: \_\_\_\_\_

For Brother \_\_\_\_\_

From Lodge of "Original Membership" \_\_\_\_\_ Lodge No. \_\_\_\_\_

"Original Membership" Lodge: \_\_\_\_\_ Lodge No. \_\_\_\_\_

For Transfer of Membership \_\_\_\_\_ Lodge No. \_\_\_\_\_

From (Lodge): \_\_\_\_\_ Lodge No. \_\_\_\_\_

To (Lodge): \_\_\_\_\_ Lodge No. \_\_\_\_\_

SEAL \_\_\_\_\_ Signature of Secretary \_\_\_\_\_

**Form 4-5-6**

Allows Brothers to withdraw from Multiple Membership or withdraw from their home Lodge & designate their other Lodge as their "Home"

**Petition for Multiple Membership**

To the Worshipful Master, Wardens and Brethren of \_\_\_\_\_, Missouri:

Lodge No. \_\_\_\_\_, located at \_\_\_\_\_

I fraternally petition to become a Multiple Member of your Lodge. If elected, I promise to conform to all the laws and practices relative to Multiple Membership of the Grand Lodge of Missouri.

In petitioning for Multiple Membership, I understand and agree that this membership shall be wholly contingent upon my "Original Membership" in a duly constituted lodge under the Grand Lodge of Missouri, or under the Grand Lodge which is in fraternal relationship with the Grand Lodge and which lawfully permits Multiple Membership.

I further agree to pay annual dues of \$\_\_\_\_\_ to maintain my Multiple Membership.

I acknowledge full responsibility for compliance of Missouri regulations. I am prepared to immediately, and of itself, terminate my membership in a Multiple Member in all lodges in the Grand Jurisdiction of Missouri.

I further acknowledge that I am subject to discipline by any lodge of which I am, or may become, and that my membership in all lodges of Missouri is dependent upon my status in good standing of the lodge of "Original Membership" and of the lodge(s) in which I hold "Multiple Membership".

I further acknowledge and agree that I may terminate my "Original Membership" by resignation and/or my "Multiple Membership" by withdrawal; that I will make my request in writing, or in person at a stated communication, for the Certificate of Discharge from "Original Membership" or the Certificate of Withdrawal of Multiple Membership" to the lodge which holds such membership in full.

I am now a member in good standing of the following lodge(s):

Lodge Name/Number	Located at	City	State	Zip
_____	_____	_____	_____	_____
Lodge Name/Number	Located at	City	State	Zip
_____	_____	_____	_____	_____
Lodge Name/Number	Located at	City	State	Zip
_____	_____	_____	_____	_____

Age: \_\_\_\_\_ Place of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

Place of Birth: \_\_\_\_\_ Telephone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Current Residence: \_\_\_\_\_

Employed by: \_\_\_\_\_

Print Full Name: \_\_\_\_\_ Title: \_\_\_\_\_

Full Name Signature of Petitioner: \_\_\_\_\_

Recommended by: \_\_\_\_\_

Signature: \_\_\_\_\_ Address: \_\_\_\_\_

Signature: \_\_\_\_\_ Address: \_\_\_\_\_

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**Petition for the Multiple Membership**

Used for Brothers wanting to become "dual" members of more than one Lodge.



**Application For Dimit Without Privileges**  
**To Terminate Masonic Lodge Membership**  
 (To be filled out by applicant) MOGL-Form 9

Date \_\_\_\_\_  
 Month, Day & Year \_\_\_\_\_

To the Worshipful Master, Wardens and Members of \_\_\_\_\_  
 Lodge No. \_\_\_\_\_ located at \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_

As a member in Good Standing of the above named Lodge, I desire to terminate my association; therefore, I  
 Respectfully request that the proper Certificate of Divulsioun be granted.

Sincerely and fraternally,  
 \_\_\_\_\_ (print name)  
 \_\_\_\_\_ (Signature)  
 Mailing Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

---

**Dimit Without Privileges** MOGL-Form 10  
 (To be completed by the Lodge & Forwarded to the Grand Secretary)

Hall of \_\_\_\_\_ Lodge No. \_\_\_\_\_ A.F. & A.M.  
 State of Missouri \_\_\_\_\_  
 Date \_\_\_\_\_  
 Month, Day & Year \_\_\_\_\_

WHEREAS, Brother \_\_\_\_\_, a Master Mason  
 and a member of this Lodge, in good standing, has applied in writing for a dimit from this Lodge, and has paid  
 all dues and otherwise conformed to the By-Laws, we therefore grant him this dimit. He ceases to be a  
 Freemason in good standing from the date of this dimit, and is not entitled to any Masonic privileges, except  
 the right to petition for affiliation.

Seal \_\_\_\_\_  
 Secretary \_\_\_\_\_

- Application for Dimit Without Privileges**
- Used for Brothers WANTING TO TERMINATE THEIR MEMBERSHIP IN THE FRATERNITY
  - A Form 4-5-6 should be used for those just wanting to terminate a multiple membership.
  - Only those in Good Standing can dimit- Thus all debts should be liquidated, etc.

## So, who uses What?

Review the scenarios below and connect them with the petition

Bro. Tom wants to move his membership to Standard Lodge #116, he already belongs to Standard Home Lodge #132

Petition for the Degrees

Bro. Jerry was suspended for NPD 6 months ago and would like to get back in good standing, he's already paid what he owed

Petition for Reinstatement

Bro. Al has decided Freemasonry is not for him

Petition for Multiple Membership

Larry wants to become a Freemason & has spoke with brothers at Shovel Lodge about his interest.

Petition for Affiliation

Tony recently moved back to town & realized he'd let his dues lapse years ago. He wants to get back active in Lodge again.

No Petition needed

W. Bro Jim was a member of Charcoal Lodge & moved across the state, he visits Chalk Lodge now since it's down the street from his new home. he's decided he wants to be a member there & drop his membership at Charcoal Lodge.

FORM 1-2-3

Application for Dimit w/o Privileges





Transfer (In State)	Multiple Membership (Plural) (In State)	Transfer (From Out of State)	Multiple Membership (Dual) (From Out of State)
Member Fills out a <b>MO GL FORM 1 &amp; PETITION FOR AFFILIATION</b> (checks the TRANSFER box)	Member Fills out a <b>MO GL FORM 1 &amp; PETITION FOR MULTIPLE MEMBERSHIP</b> (checks the MULTIPLE MEMBERSHIP Box)	Member Fills out <b>MO GL FORM 1 &amp; PETITION FOR AFFILIATION</b> (checks the TRANSFER Box)	Member Fills out <b>MO GL FORM 1 And PETITION FOR MULTIPLE MEMBERSHIP</b> (checks the MULTIPLE MEMBERSHIP Box)
Member Presents both forms to the <b>INCOMING LODGE SECRETARY</b>	Member Presents both forms to the <b>INCOMING LODGE SECRETARY</b>	Member Presents both forms to the <b>INCOMING LODGE SECRETARY</b>	Member Presents both forms to the <b>INCOMING LODGE SECRETARY</b>
<b>INCOMING LODGE SECRETARY</b> sends the <b>MO GL FORM 1</b> to the <b>OUTGOING LODGE SECRETARY</b>	<b>INCOMING LODGE SECRETARY</b> May use a <b>DUES CARD</b> in lieu of a <i>Certificate of Good Standing</i> . But he must contact the Member's <b>OTHER LODGE SECRETARY(s)</b> to verify the Member is <i>Not pending Masonic Charges</i> .	<b>INCOMING LODGE SECRETARY</b> sends <b>MO GL FORM 1</b> to the <b>GRAND LODGE OF MISSOURI</b>	<b>INCOMING LODGE SECRETARY</b> sends <b>MO GL FORM 1</b> to the <b>GRAND LODGE OF MISSOURI</b>
<b>OUTGOING LODGE SECRETARY</b> Reads <b>MO GL FORM 1</b> at a Stated Communication, if Member has <i>paid current year's Dues</i> , and is <i>Not pending Masonic Charges</i> . Fills out <b>MO GL FORM 2</b> and Sends it to the <b>INCOMING LODGE SECRETARY</b>	<b>INCOMING LODGE SECRETARY</b> Fills out a <b>MO GL FORM 2-(Certificate of Good Standing)</b> and Checks the Box - <b>DUES CARD USED IN LIEU OF CERTIFICATE OF GOOD STANDING</b> ( this does <u>NOT</u> have to be sent to the <b>OTHER LODGE SECRETARY(s)</b> )	<b>GRAND LODGE OF MISSOURI</b> Sends the <b>MO GL FORM 1</b> to the <b>OUTGOING (Out of State) GRAND LODGE</b>	<b>GRAND LODGE OF MISSOURI</b> Sends the <b>MO GL FORM 1</b> to the <b>OUT OF STATE GRAND LODGE</b>
Upon Receipt of the completed <b>MO GL FORM 2-(Certificate of Good Standing)</b> the <b>INCOMING LODGE MASTER</b> Receives the <b>PETITION FOR AFFILIATION</b> and assigns an Investigating Committee at a Stated Communication	<b>INCOMING LODGE MASTER</b> Receives the <b>PETITION FOR MULTIPLE MEMBERSHIP</b> and Assigns an Investigating Committee at a Stated Communication	<b>OUTGOING (Out of State) GRAND LODGE</b> Sends the <b>MO GL FORM 1</b> at a Stated Communication and if Member is in Good Standing, Fills out a <b>CERTIFICATE OF GOOD STANDING</b> and sends it to their <b>OUTGOING (Out of State) GRAND LODGE</b>	<b>OUT OF STATE GRAND LODGE</b> Reads <b>MO GL FORM 1</b> at a Stated Communication and if the Member is in Good Standing, Fills out a <b>CERTIFICATE OF GOOD STANDING</b> and sends it to their <b>OUT OF STATE GRAND LODGE</b>
At the <b>NEXT</b> Stated Communication upon receipt of the Investigating Committee Report a <b>2/3<sup>rd</sup>'s PAPER BALLOT</b> is conducted	At the <b>NEXT</b> Stated Communication upon receipt of the Investigating Committee Report a <b>2/3<sup>rd</sup>'s PAPER BALLOT</b> is conducted	<b>GRAND LODGE OF MISSOURI</b> Sends the <b>CERTIFICATE OF GOOD STANDING</b> to the <b>INCOMING LODGE SECRETARY</b>	<b>OUT OF STATE GRAND LODGE</b> sends the <b>CERTIFICATE OF GOOD STANDING</b> to the <b>GRAND LODGE OF MISSOURI</b>
Upon Election the <b>INCOMING LODGE SECRETARY</b> fills out a <b>MO GL FORM 3</b> (Notice of Election) and sends it to the <b>OUTGOING LODGE SECRETARY</b> (copies should be retained in the <b>INCOMING LODGE</b> )	Upon Election the <b>INCOMING LODGE SECRETARY</b> fills out a <b>MO GL FORM 3</b> (Notice of Election) and sends it to the Member's <b>OTHER LODGE(s)</b> (copies should be retained in the <b>INCOMING LODGE</b> )	Upon Receipt of the <b>CERTIFICATE OF GOOD STANDING FOR AFFILIATION</b> and Assigns an Investigating Committee at a Stated Communication	Upon Receipt of the <b>CERTIFICATE OF GOOD STANDING FOR MULTIPLE MEMBERSHIP</b> and Assigns an Investigating Committee at a Stated Communication
<b>INCOMING LODGE SECRETARY</b> Adds the Member to the Membership Portal via <b>IN JURISDICTION TRANSFER</b>	<b>INCOMING LODGE SECRETARY</b> Adds the Member to the Membership Portal via <b>PLURAL MEMBERSHIP</b>	At the <b>NEXT</b> Stated Communication upon receipt of the Investigating Committee Report a <b>2/3<sup>rd</sup>'s PAPER BALLOT</b> is conducted	At the <b>NEXT</b> Stated Communication upon receipt of the Investigating Committee Report a <b>2/3<sup>rd</sup>'s PAPER BALLOT</b> is conducted
<b>OUTGOING LODGE SECRETARY</b> Clicks <b>APPROVE</b> for the Member's Pending Transfer on the Lodge Dashboard	<b>INCOMING LODGE SECRETARY</b> Adds the <b>OUT OF JURISDICTION</b> Member to the Membership Portal	Upon Election the <b>INCOMING LODGE SECRETARY</b> fills out <b>MO GL FORM 3</b> (Notice of Election) and sends it to the <b>GRAND LODGE OF MISSOURI</b> who Notifies the <b>OUTGOING GRAND LODGE</b> that the Transfer is complete. (copies should be retained in the <b>INCOMING LODGE</b> )	Upon Election the <b>INCOMING LODGE SECRETARY</b> fills out <b>MO GL FORM 3</b> (Notice of Election) and sends it to the <b>GRAND LODGE OF MISSOURI</b> who Notifies the <b>OUT OF STATE GRAND LODGE</b> that the Member is now a <b>DUAL MEMBER</b> With <b>MISSOURI</b> . (copies should be retained in the <b>INCOMING LODGE</b> )

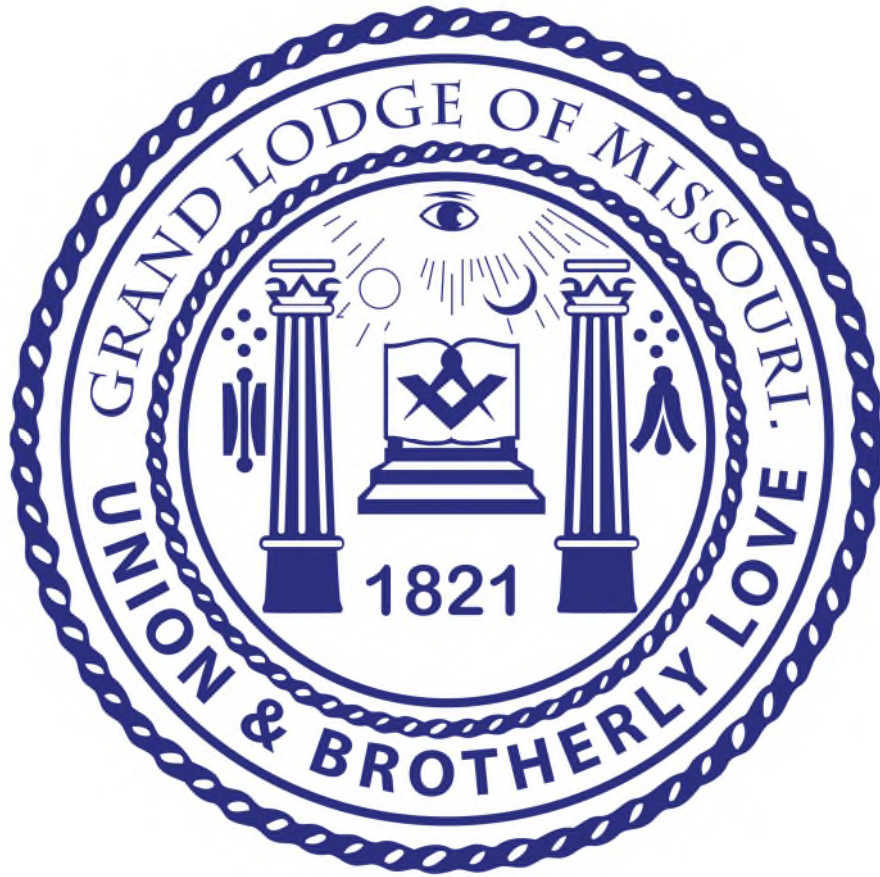
# Module 2: Notes







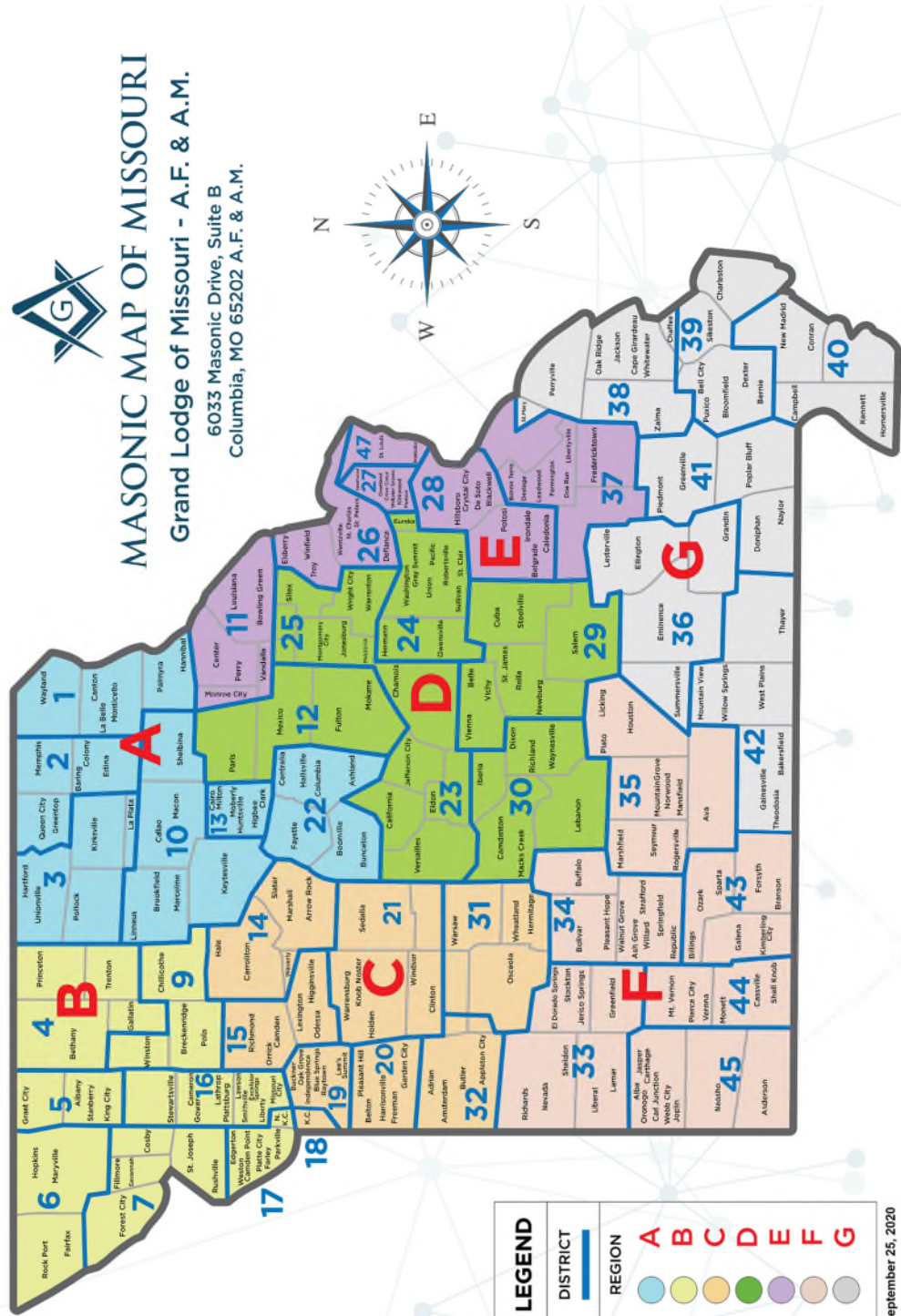
# Module 3: The Grand Lodge of Missouri & You





# Masonic Map of Missouri


  
**MASONIC MAP OF MISSOURI**
  
**Grand Lodge of Missouri - A.F. & A.M.**
  
 6033 Masonic Drive, Suite B
   
 Columbia, MO 65202 A.F. & A.M.



LEGEND	
DISTRICT	—
REGION	●
A	●
B	●
C	●
D	●
E	●
F	●
G	●

September 25, 2020



# Grand Lodge of Missouri Staff



**GRAND LODGE OF MISSOURI, AF&AM**  
6033 MASONIC DRIVE, SUITE B  
COLUMBIA, MO 65202-6568

PHONE: 573-474-8561  
TOLL-FREE: 877-B-A-MASON (877-226-2766)  
Website: <http://www.momason.org>  
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E-Mail: [grlodge@momason.org](mailto:grlodge@momason.org)

Business Hours: 8:30 AM-5:00 PM Weekdays  
(The office may be closed over the noon hour)

**Jon B. Broyles, P.G.M., Grand Secretary**  
E-Mail: [grandsecretary@momason.org](mailto:grandsecretary@momason.org)

*\*\*\*All Staff members are capable of handling Online Membership Portal (Database) Questions and Assistance along with Lodge Information and Member Record changes.*

**Sandy Freese** – [sfreese@momason.org](mailto:sfreese@momason.org) - *Comptroller*; Sandy manages the Grand Lodge, Masonic Children's Foundation, Scholarship Fund, Inc and Missouri Lodge of Research Financial Operations. She also directly handles reimbursements, donations, Lodge EINs and 990's, Endowed Memberships, Masonic License Plates and the Lodge Annual Returns.

**Kasey Ryan** – [krayan@momason.org](mailto:krayan@momason.org) – *Membership Coordinator*; Kasey's manages all incoming and outgoing first class and bulk mail operations. Kasey manages the Grand Lodge 50 year certificate and pin program and is also the principle contact for other service awards such as 25, 60, 65, 70, 75 and 80 year Certificates and pins upon request. Kasey also receives and Tracks all DDGM and DDGL Reports and manages dues collection and book mailings for the Missouri Lodge of Research.

**Laura Ludlow** – [lludlow@momason.org](mailto:lludlow@momason.org)– *Event and Recognition Coordinator*; Laura manages the Grand Lodge Event Invitation Requests and Travel Arrangements, Dispensations, C2A's, Awards & Certificates, Order of the Past Master, Ritual Subdivision Cards and Scholarship program tracking and correspondence. She also processes DDGM/DDGL Reports and is the principle contact for Annual Communication Pre-Registration.

**Jennifer Smith** - [membership@momason.org](mailto:membership@momason.org) – *Membership Coordinator*; Jennifer's duties at the Grand Lodge Office include In State Transfers-Affiliations / Plural Memberships & Withdrawals, Foreign Jurisdiction Affiliations and Correspondence, Dimits and Dues Cards Requests; She is also the principle contact for Grand Lodge Supply and Literature Orders and She conducts/coordinates archive and historical research.

**Membership Requests-** [membership@momason.org](mailto:membership@momason.org) – General Online Membership Portal (Database) Questions and Assistance, Lodge Information and Member Record Changes.

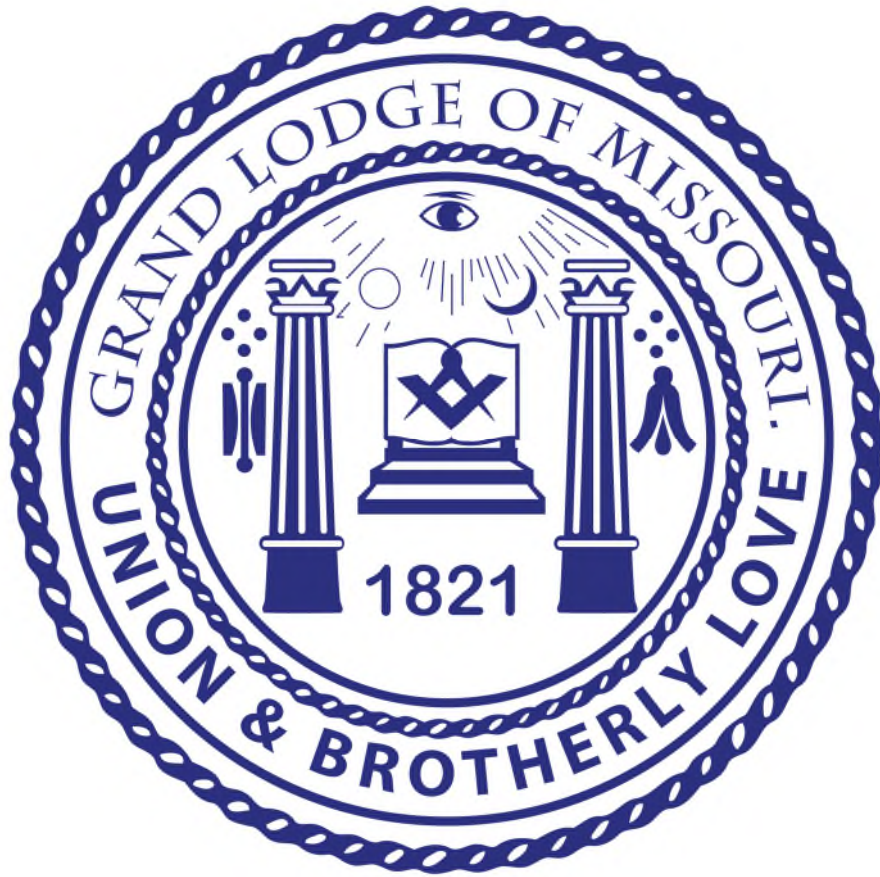


# Module 3: Notes





# Module 4: Stated Communication Management







## Keeping the Craft in Line – Agendas & Examples

A planned agenda lays the necessary framework for effective time management, creates the focus which sets Brothers' expectations, and prepares them for ensuing discussions.

Effective ways to create a successful agenda:

- Be clear
- Organize information logically and in a manner which keeps the flow of business smooth
- Stick to the format- sidebar conversations and off-track topics can derail a meeting in no time
- Consider having certain parts of the Lodge business shifted to printed/digital form (if applicable)
- Consider having the minutes prepared prior to the meeting vs. read openly
- Request simple committee reports
- Display various reports on monitors, etc. and present highlights
- Ensure Brothers understand that potential Business items should be mentioned to the Master before the Communication.
  - He has the ability to set those aside for another meeting if need be. Such notice is courteous and helpful as the agenda may not afford time for an unannounced discussion.

**\*See Appendix IV for additional agenda examples\***

# AGENDA EXAMPLE 1

## Agenda

Standard  No 101 A.F. & A.M.

July 20th, 2020 AL 6020

- I. Pledge of Allegiance and Opening in Due Form on all 3 Degrees
- II. Draping of Charter & Reading of Record- W. Bro. Tom Doe
- III. Offer of (Symbolic) Fraternal seat in the East to all RWBs and W. Bros.
- IV. Reading (Approval) of unapproved minutes (posted/ provided prior to Com.)
- V. Treasurer's Report \_\_\_\_\_
- VI. ~~Report of Committees on Petition~~
- VII. Petitions presented
- ~~VIII. Report of Standing Committees~~
- IX. Report of Select Committees-
  - a. GLAA Points Committee- Submitted on 7/8- Final Points total **2160**
    - i. Honor Lodge with Distinction Qualified
  - b. MHM Paverstone Fund Committee- Prior to tonight **\$398.28**
  - c. Trestleboard Committee-Issue out last week
  - d. Fish Fry Committee- Jr & Sr. Warden
    - i. Result so far? \_\$320 as of 6/26/2020\_\_
    - ii. Status on letters
  - e. Lodge By-Laws Review Committee- Review for further changes if any and authorization for reprint following review and final changes.
    - i. R.W. Bro. Washington, Bro. Adams, R.W. Bro. Jefferson, R.W. Bro. Revere.
- X. Motions and Resolutions
- XI. Unfinished Business
  - a. Inquiry on database- Mr. John Doe- Have made phone & email contact
- XII. Communications-
  - a. Others on Secretary's desk
- XIII. Sickness and Distress-
- XIV. Misc. Business-
  - a. Masonic Funeral Service- Bro. Johnson- July 25<sup>th</sup>-10:45am
    - i. First Christian Church
    - ii. W. Bro. Jefferson, presiding & will gather materials
    - iii. Who else can attend or is available?
  - b. Masonic Education "The Noachites: Masonry's Original 3<sup>rd</sup> Degree Allegory?"
  - c. District/Area Happenings
    - i. Standard Lodge 301 Installation of Officers- August 15<sup>th</sup>, Noon meal, 1 Installation
  - d. Announcements if any by Officers-Elect
    - i. Open Installation of Officers- August 3<sup>rd</sup>
- XV. Adjourn and Close in Due Form

## SUGGESTED\* ORDER OF BUSINESS

1. The unapproved minutes shall be read and approved
2. Unfinished business
3. Reports of committees on petition
4. Petitions presented
5. Report of standing committees
6. Report of select committees
7. Sickness and distress
8. Motions and resolutions
9. Miscellaneous business

\*Taken from the *Masonic Manual of Missouri*, p. 105

Note: Some Lodges use a simpler version laid out in the Missouri Manual. This is a suggested order of business only and provides a base approach. The important detail is to use a consistent agenda and format which will increase efficiency of the business meetings.

## Balloting – So Many Ways, What’s Right?

Voting processes for Lodges carry many functions but primarily we see them involved with the approval of petitions. Outside that scope we can see the utilization of voice votes or hand votes for general business and approvals

**When do we ballot on Petitions?** *Only at a Stated Communication*

**Who can vote when a ballot on petition occurs?**

- All qualified members of the Lodge present **MUST** vote. They cannot abstain
- “Qualified” would be deemed as in the general sense of “Good Standing” i.e., Dues paid
- *Keep in mind that per an Edict issued in 2014 it has been clarified that a new Master Mason, who has not yet paid the initial prorated dues, is not eligible to vote*

### How do we vote on petitions?

Ballot Type	For Degrees	For Affiliation*	For Multiple Membership	For Reinstatement
		Accompanied by Cet. Of Good Standing		
<b>Method</b>	Ballot Box	Paper Ballot	Paper Ballot	Paper Ballot
<b>Margin Needed for Election</b>	No more than 2 black cubes <i>(Section 15.060)</i>	2/3 Majority	2/3 Majority <i>(Section 17.110)</i>	2/3 majority <i>(Section 19.050)</i>

- All ballots must be free and secret. No member may disclose his vote.
- Ballots can be collectively voted on but if dissenting votes appear should follow the procedures outlined in Section 15.080.
- \*Ballots for Affiliation accompanied by dimit require a vote via ballot box with the same margin as petitions for degrees per Section 15.060.
- **KEEP IN MIND-** When paper ballots are involved, a blank ballot is not counted

# Official Visits – Tools for the Before, During, & After

## Pre-Visit

1. Meet with your DDGM prior to the night of the visit to discuss any special needs or requests he may have as well as ascertain what materials you may need to have ready for his arrival. It is best to have this discussion with your Secretary and Wardens included.
  - a. This is a great time to ask questions, inquire for clarity about something concerning you, or seek input from the DDGM regarding Lodge issues. Additionally, this helps to allow you time to open a dialogue and express any needs you have from the District or concerns you would like forwarded on to the Officers of the Grand Lodge.
2. Practice and walk through the reception of Distinguished Guests.
  - a. Not every DDGM, DDGL, etc. will expect this nor is it necessary at every visit but it is an important formality and traditional ceremony that should be observed if can be. Remember the DDGM is a direct representative of the Grand Master and that evening is an important part of the masonic year.
  - b. Ask the DDGL or another knowledgeable Brother to instruct the practice.
  - c. Remember it is a ceremony and NOT ritual. If Lodge attendance does not allow you to fill each needed station, common sense dictates that the Master does the best with his resources.
3. Coordinate with your officers to insure their attendance and your membership's presence.
  - a. This includes that you will have suitable additional Brothers to serve as Substitute Deacons during the Reception Ceremony if possible, etc.
4. Key things to consider as you prepare your agenda for the evening:
  - a. No business is conducted after the DDGM begins his Official Visit, i.e. once received.
  - b. Generally, no degree work or other ceremonies should be held unless first cleared by the DDGM and he is aware of them.
  - c. Tradition dictates that the Master as courtesy offers to DDGM the ability to close the Lodge Communication, he may decline but it is considered courtesy to at least offer.
  - d. Remember the Lodge must open on all 3 Degrees.
    - i. Complete any ordinary Business as may be needed.
5. Review and communicate with the DDGM prior to his arrival about any questions, protocols, or concerns you may have.

### **Night of Official visit**

- Get the word out to your members and other Lodges that the night has been scheduled.
  - Your DDGM will do a good job of informing surrounding Lodges but it's up to you to inform your membership.
- Ensure all necessary paperwork has been collected and ready if needed for the DDGM to examine.
- Ensure officers are all aware of their duties and that arrangements like the Substitute Deacons are appointed and ready (if possible).
- Remember that that all announcements, business, etc. MUST be concluded before the DDGM is received and begins his portion of the evening.
  - It won't destroy the world if something comes up, but courtesy dictates things be completed before he begins.
- Remember that inviting him to speak or sit in the East is technically letting him begin his visit. That means you may naturally want to skip over asking him for his remarks or inviting him to a seat in the East during the normal meeting. Withholding that invite in this situation isn't considered an insult or being discourteous .
- Once completed with any necessary business of the evening its acceptable to ask the DDGM to retire from the Lodge Room so that he may be received properly.
- Enjoy the evening and the visit. Consider this a time to show off your Lodge's ritualistic ability and administrative management. The DDGM is here to observe how you function as a Lodge and insure it is up to the expectations of the Grand Lodge, Constitution & By-Laws, etc.

**\*See Appendix V for Official Visit worksheets\***



**Completed during his visit. The Report of the District Deputy Grand Master provides the Grand Master and Grand Lodge with an overview of your Lodge's status & existence, as well as operational layout**



**Report of the District Deputy Grand Master – Masonic District No. \_\_\_\_\_**

Lodge Name & No.: \_\_\_\_\_ Date of the Official Visit: \_\_\_\_\_

TOTAL Attendance: \_\_\_\_\_ Total Members Present: \_\_\_\_\_ Number of Visitors: \_\_\_\_\_

Meeting Place (Physical Address): \_\_\_\_\_

Mailing Address (for GL Correspondence): \_\_\_\_\_

Meeting Schedule: \_\_\_\_\_ Average Attendance: \_\_\_\_\_ Total Lodge Membership: \_\_\_\_\_

Last time Lodge Raised a New Master Mason: \_\_\_\_\_ Average New Members Per Year: \_\_\_\_\_

Meeting Place Ownership Description (Rent/Own/Temple Association): \_\_\_\_\_

If Owned, is it Insured? \_\_\_\_\_ Amount: \_\_\_\_\_ If Assoc, Compliant with 9.070-9.100? \_\_\_\_\_

Annual Dues (Incl. Per/Cap):\$ \_\_\_\_\_ 50-Year Exempt? \_\_\_\_\_ Total Initiation Fee:\$ \_\_\_\_\_

Does the Lodge Maintain a Separate Charity or Benevolent Fund? \_\_\_\_\_

Did the Lodge Adopt a Budget for Last Year? \_\_\_\_\_ This Year? \_\_\_\_\_ 3 Year Plan? \_\_\_\_\_ Viewed? \_\_\_\_\_

Current Year 990 filing? \_\_\_\_\_ Viewed? \_\_\_\_\_ Treas. Report compliant with 9.051 of GL Bylaws? \_\_\_\_\_

Local & Grand Lodge Bylaws Available for Members? \_\_\_\_\_ Viewed Them? \_\_\_\_\_

Does Lodge have Newsletter? \_\_\_\_\_ How Distributed? \_\_\_\_\_ How Often? \_\_\_\_\_ Viewed it? \_\_\_\_\_

Does the Lodge use Social Media (Facebook, Twitter, Webpage, Etc.)? \_\_\_\_\_

Web Address: \_\_\_\_\_ Lodge Email Address: \_\_\_\_\_

Does the Lodge have Active Committees & Appointments? \_\_\_\_\_ Budget? \_\_\_\_\_ Audit? \_\_\_\_\_

Historian? \_\_\_\_\_ Masonic Home Rep (Name): \_\_\_\_\_ LEO (Name)? \_\_\_\_\_

What Youth Organizations does the Lodge Support (List)? \_\_\_\_\_

Lodge & Community Activities (PM Night, Widows Dinner, First Responders Appreciation, Etc.): \_\_\_\_\_

Remarks or recommendations, including your frank and general appraisal of the State of the Craft and the condition of the Lodge (NOT the Hall or Building):

\_\_\_\_\_

\_\_\_\_\_, District Deputy Grand Master  
Signature





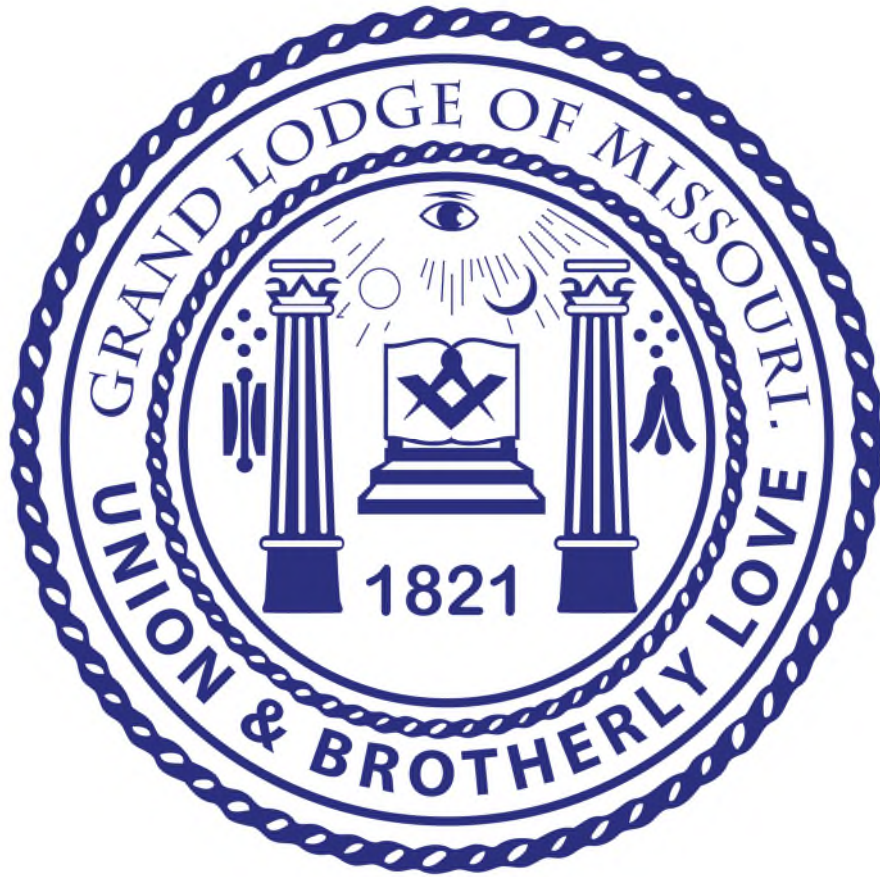


# Module 4: Notes





# Module 5: Guarding the West Gate





## Best Practices for the Guardians

The steps leading a man to knock at our door come from many paths, and in the course of those interactions there are generally a few phases leading to the door of the Lodge room. Take a moment to consider some of these initial practices for meeting with men PRIOR TO them receiving a petition.

- **Consider not presenting a petition to a potential candidate unless you are truly comfortable with putting your “signature and name” behind him.**
- **Consider not giving a potential petitioner a petition until he has attended a set number of events or had a specified number of interactions with Brethren**
  - **This can build the Brethren’s knowledge of the potential brother and insure he fits the culture of the Lodge**
- **Don’t be afraid to discuss other options if your Lodge or Masonry may not be a good fit. Another local lodge may be better suited to meet his needs or perhaps another organization.**
- **Ask and begin basic discussions with the potential member about his interest in Freemasonry**
- **Assign a Point of Contact for the potential petitioner (someone other than the Master or Secretary.) That Brother can serve as a liaison and help guide the potential candidate through initial steps.**

**What are some practices you think are important?**

## Meeting with the Petitioner – the Investigation

If the man seems like a good fit, and Brothers are comfortable signing their names to his petition, then we cross the threshold to investigation. If your Lodge was diligent in meeting with and getting to know the candidate, much of the investigation occurred potentially during fellowship and conversation well ahead of receiving the petition.

- Prior to meeting with the petitioner- review and inquire into his character and fitness by following up on the references listed on his petition.
- Make the petitioner feel comfortable, while a serious matter we don't want him to feel cornered or intimidated.
- Ask serious questions when interviewing and meeting with him, it can be fun and lighthearted at times, but he should also understand the scope of what he's pursuing as well as our expectations.
  - Be clear and explain what the Craft will expect of him, what he can expect from Freemasonry, and what Freemasonry is not. These topics should be explained to his satisfaction and that of the committee.
  - Be frank and honest answering his questions, realize where the line between what is secret & what isn't sits, & answer as best possible.
- Ensure his spouse or significant other is comfortable with his participation and joining the fraternity
- If during the discussion you come to a sense that Masonry or your Lodge might not be a good fit, don't be afraid to discuss other options. Another local lodge may be better suited to meet his needs or perhaps another organization.
  - *In most cases we can hope this doesn't occur & was mitigated prior to the petition being received.*
- Ensure the candidate knows who his point of contact is within the Lodge, and who will contact him regarding election or rejection.
- Consult the Grand Lodge's "*Manual of Investigation*" for other pointers

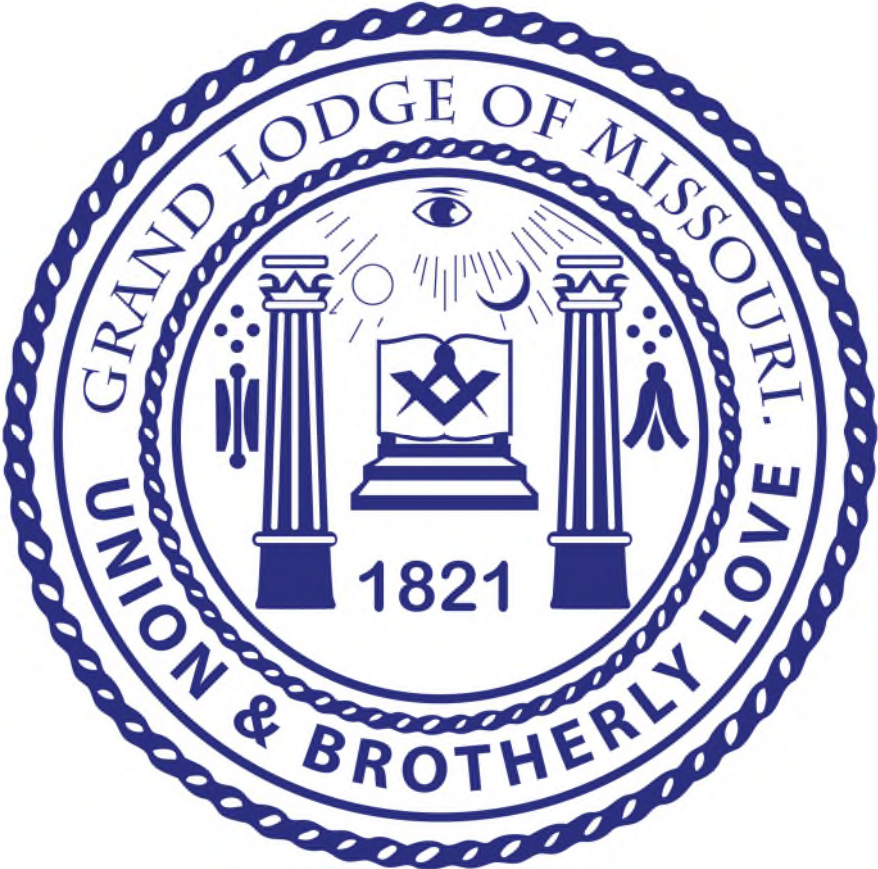
# Module 5: Notes







# Module 6: Membership Engagement & Retention





## Communicating to the Craft - Trestleboards

# When Brothers are out of the loop, we all fail

Communicating and creating touchpoints for our members help to build a continued relationship. This helps Brothers to feel connected, even if they live far away from the lodge or cannot make many meetings. Our efforts to keep Brothers informed and to communicate clearly are key parts of the retention process. When Lodges make a consistent effort to communicate with Brothers and utilize various mediums for that effort, they not only strengthen the Lodge but renew the mystic tie with each Brother.

A Lodge who lacks a presence on multiple platforms and does not communicate regularly through them can risk potentially missing the attention of a possible petitioner or Brothers lost in the melee.

Keeping information, even simple content going engages Brothers once a good balance is found for timing and to fit the needs of the Lodge's current calendar and plans.

### Lodge can utilize various tools to reach members including:

- Trestleboards
- Websites
- Social Media
- Text Contact
- Email distribution
- Grand Lodge Portal posting
- Various mobile applications+
  - Band, Slack, GroupMe, Discord, etc.





## Swope Park Lodge Installation of Officers

By WB James O'Shea

At 5:00 pm on Saturday, October 6, Worshipful Master Kevin Sykes opened Swope Park Lodge #617 for his final time as Worshipful Master passing his Office of Responsibility over to Brother Jody Hale. The colors were presented by WM F. Kuhn DeMolay members Brother Jeffrey Sykes and Brother Walter Stanley followed by a Bible ceremony under the direction of Jobs Daughters, Bethel #1 Chapter. The installing team of Marshal, RWB Kelly Mercer; Chaplain, WB Roy Thomas; Senior Deacon, RWB Cecil Wagers and Master, RWB Glen Burrows appeared west of the altar prior to arriving at their assigned positions for the ceremony. In single file

fashion each Swope Park officer entered into the lodge room with their spouse at their side. Carrying a long-stem rose they approached their seat to watch the ceremony. The Installing Master called on all officers to be installed, who then filed into the lodge circumambulating the altar to their respective chairs for the ceremony. The installing Marshal presented each officer at the altar and after receiving their charge by the installing Master were presented with their proper jewel of their office and then escorted to their proper station. Worshipful Brother Jody Hale was first and escorted to the East through the Arch of Steel provided by William F. Kuhn

Chapter members. Junior Warden, RWB Larry Cameron followed by receiving his charge, jewel of his office, and then escorted to his station in the south. Other officers followed in like fashion including Senior Deacon—Larry Alvis and Junior Deacon—Tim Alvis, Treasurer—RWB Gary Dryer and Secretary—RWB Kenneth Best, Senior Steward and Junior Steward—Walter Stanley and Jeremy Hoffecker, Tiler—WB Kevin Sykes, and lastly Chaplain and Organist—Albert McDowell.

Introductions were made, announcements given, and several presentations followed. Pictures were taken of all officers and supporting installation team. At the conclusion of all business, everyone was invited to Shotwell Hall for some Masonic fellowship and to enjoy a delicious meal of breaded cutlet, mashed potatoes, coleslaw, and rolls prepared by Jamie Hale and Michele Sykes with sheet cake, cupcakes, and drink for dessert.

WB Glen Burrows presented Worshipful Master Jody Hale with his gavel of authority to take charge of the meeting.

This event was supported by family, friends, other Masonic brothers, and Masonic family members.







# Trestleboard

Wentzville Lodge #46 A.F.&A.M.

602 Meyer Road, Wentzville, Missouri 63385



www.mofreemason.com/wentzville46

Joseph W. Stewart, Worshipful Master

WINTER 2020

email: lodge46@gmail.com

Christopher J. Newbold, Secretary



## Happy Holidays!



*May you and your family have a safe and blessed holiday season!*

**MWBro Barry V. Cundiff**  
New Grand Master  
2020 - 2021

 **Annual Salvation Army  
Holiday Red Kettle Collection**  
Wentzville Walmart  
**Friday November 27**  
**Saturday November 28**  
Please contact the Secretary to  
sign up for a 2 hour shift

Congratulations to  
**Bro Howard K. Slinkard**  
on his **50 year anniversary** as a  
member of the fraternity.  
(November 7, 2020)  
Thank you for your service!

**To all brethren, widows and  
members of our  
Masonic Family:**  
If you or your family need assistance of any kind, please contact our lodge. We have brothers that are willing and able to try to help if they can do so.  
  
lodge46@gmail.com



### Message from the Master



My Brethren,

I hope this finds you and your family well as we approach the many holidays this season. As we change from one season to the next, the once vibrant tree branches waving in the wind begin to wither and brown, bringing the recent harvest and ongoing blessings that come with it. As we think of the harvest let it remind us of the Cornucopia, used as a symbol of our modern Thanksgiving holiday, and likewise the Cornucopia of Freemasonry, known as the symbol for the stewards. Let it be a simple example of the symbols and signs of Freemasonry in our daily lives. Let us be mindful of our Masonic responsibilities that can be summed up in one word, "practice." We have the responsibility of practicing and living masonry in our daily lives. Forget not those that are less fortunate than yourself, take time and check on family, brothers, and friends as we continue to face the ongoing challenges that COVID has brought.

As the year comes to a close we have many more fun Masonic activities planned for us. Our planned events still left this year include a Family Board game night, Salvation Army bell ringing, our Annual Holiday party, and a Special Lodge meeting on Dec 30th- the 5th Wednesday of the month. Please come and join us in Lodge.

Finally, brethren, may the blessing of heaven rest upon you and your family.

Fraternally,

Joe Stewart, Worshipful Master



## Social Media & Masonry

In the fast-paced world that many of our members and potential members exist in having a presence online and via social media platforms should be an integral part of your Lodge 's approach to public relations and communication

Keeping in mind that each Lodge is unique in its own culture and environment, certain platforms may appeal better or serve a greater need than others.

Additionally, a Lodge may want to clearly delineate between an **internal social media** presence and an **external social media** presence. Having a handle on how you approach events, communicate to your members and to those community stakeholders around you will guide some of these efforts

**Internal Social Media-** Private group pages for members, etc. which can be used to recognize individual brothers, highlight more private events, foster discussion on upcoming activities or business.

**External Social Media-** Public pages, easily findable and viewable by the profane. These can serve to promote Lodge events, announce public activities and celebrate success of the Lodge. Importantly though, it should be remembered that these are outward facing, and improper management can reflect poorly on the Lodge and Craft at-large. Additionally, such pages can draw attention from those who do not look favorably on masonry. In either situation temperance and prudence must guide the efforts and when utilizing these resources.





## Social Media & the Grand Lodge

The Grand Lodge of Missouri, under the curation of the Public Relations Committee manages multiple social media accounts meant to provide positive interactions with our membership and the profane world. Such tools allow additionally for the creation of touchpoints and enables the Grand Lodge to highlight Brothers and share news as may deemed appropriate.

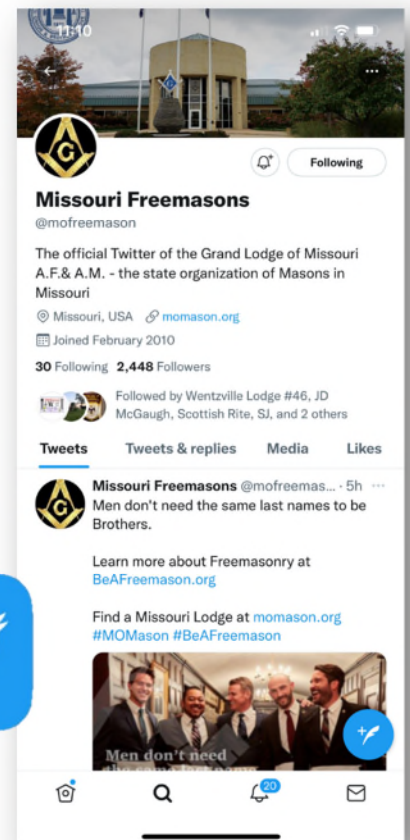
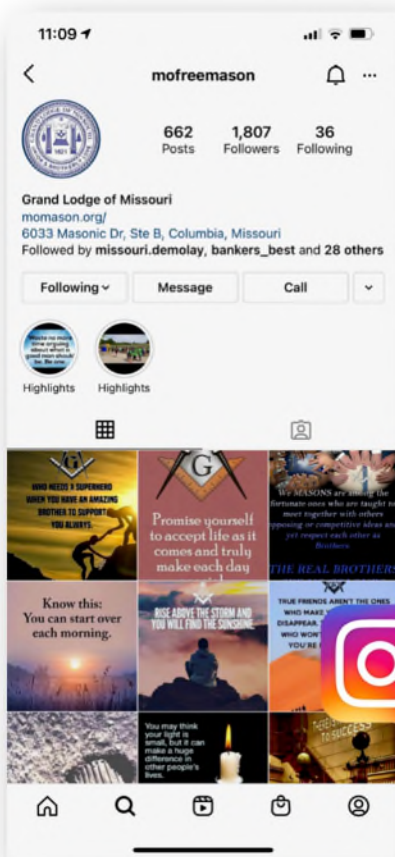
Current profiles and accounts are based on:

**Facebook** Grand Lodge of Missouri or @MissouriMasons

**Twitter** Missouri Freemasons or @mofreemasons

**Instagram** @mofreemason

**YouTube** Grand Lodge of Missouri



## Keys to Great Content & Management

Catching someone's attention and keeping it are important aspects of retention, whether we're discussing membership or social media. To help ensure your Lodge's social media efforts are engaging keep the following in mind:

- Consider if possible, allowing a Brother with a professional skill set or training in social media management handle the day-to-day administration
- Ensure communication and responses to *legitimate* messages are prompt and handled in an appropriate manner
- Keep in mind that there are members of the profane world who have objections to Masonry, a public page can draw the ire of those individual. Circumscribe your passions accordingly
- Realize the delineation between content suited for a page accessible by Lodge members only and by the profane. A Lodge's laundry need not be hung for all to see.
- Keep content flowing, recycling material will lose the attention of those following, or even your members. Consistent content will help build interest. This can range from a daily "masonic thought" to highlighting each activity with a few pictures and announcements. Diversify your approach and see what happens.
- Keep in mind the Grand Lodge produces a *Public Relations Manual* with lots of great tools and ideas



*NOT JUST A MAN. A MASON.*™

# Fellowship- Since the dawn of the Craft

Many Brothers misconstrue fellowship as simply sitting around before Lodge and drinking a cup of coffee, catching up. While that's a part of it, that's not all there is. Fellowship & the fraternal spirit can be fostered far and wide building a brotherhood that's more than just a group of men who meet once or twice a month, then part but for the occasional pancake breakfast or yearly fish fry. Quality fellowship can benefit not only the Craft but the community and provide outlets for the lodge to present a public image and interact outside the wall of the temple.

## Potential Activities

Events and Activities can focus on plenty of areas, it isn't cookie cutter or simple.

Think differently & consider what will engage your membership the most!

- Holiday Party (pick one! Halloween, Christmas, or any other that may be enjoyed by your Lodge)
- Family Picnic
- Book Club (Held at the Lodge, a restaurant, cigar bar, or Brother's house)
- Ladies Dinner (as a standalone event or perhaps a Valentines Dinner)
- Lodge Workday & BBQ
- Family Movie Night
  - Or Brothers-only Movie night (at the Lodge or Theater)
- Special Banquet or Ceremony highlighting a Lodge or Local event (bicentennial, city founding, etc.)
- Lodge Social Trip to Theater, Zoo, Museum
- Bourbon/Scotch/Wine/Tequila Tasting Event
- Golf Outing
- Cornhole League
- Ice Cream Social
- Family Craft Night



## Meetings We Don't Want to Miss!

What makes our meetings different? How can we work to ensure Brothers want to attend and participate? How do we stand out above the crowd?

- Include a viable program at every meeting
- Encourage Brothers to help contribute to meeting programming and content
- Keep meetings on track & on time
- Ask Questions! Determine what interest our members have and try to include those in some fashion.
- Work to maximize efficiency for Lodge operational management
  - Our Communications often get eaten by Business, but they should not! If paying the bills and approving the minutes takes up half or more of your meeting, then you're wasting Brother's time. Business should be presented quickly and efficiently. Find the manner that effectively addresses the needs of the Lodge while not becoming burdensome. The Master can call an end to committee, table a motion to the next Communication, assign the item to committee, or even call for a vote.

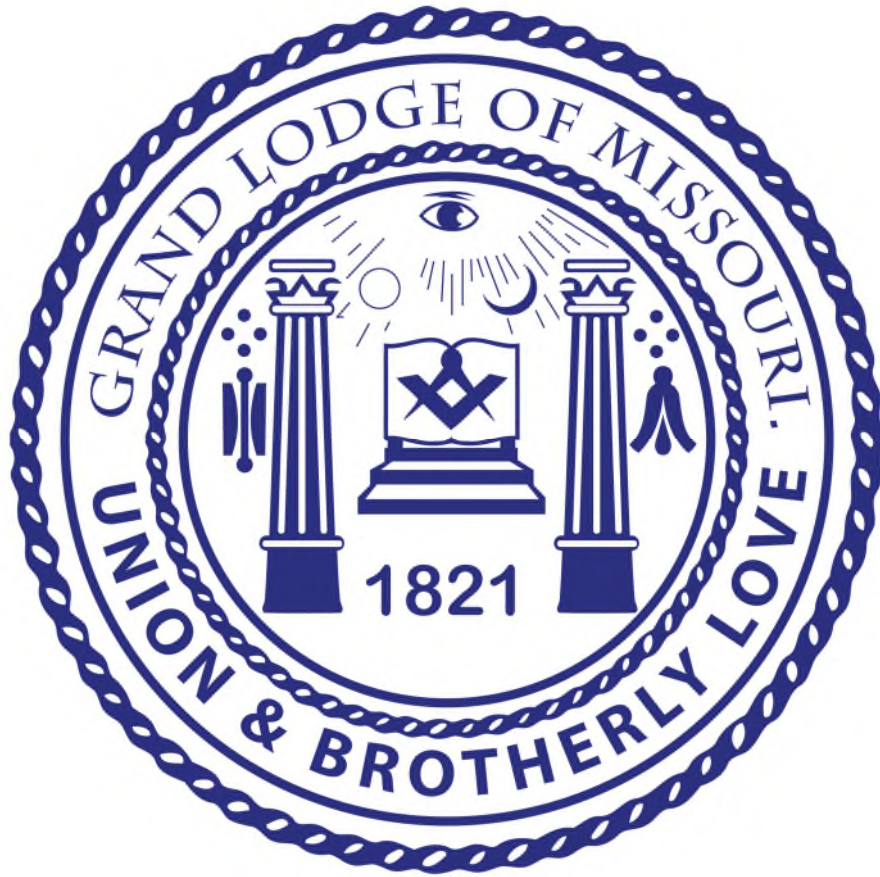
**What is something you've seen or noticed at a Lodge's Stated Communication that you felt made attending the meeting worthwhile? What did you most enjoy about that thing or event?**

# Module 6: Notes





# Module 7: Masonic Education & the Craft







# Ensuring the Experience – Candidate Education & Tracking

## Getting in the game- The Lodge Education Officer

### ***Who is the LEO?***

*Appointed by the Master to at his direction develop and carry out plans for the continuing Masonic Education of all members. Subject to master's approval and applicable by-laws such officer can select, organize, and direct a Lodge Education Committee to aid him in his work. Per Section 9.180*

### ***Why worry about and LEO and an Education Program?***

Establishing and coordinating Education programs for your Lodge help to insure a worthwhile experience in the Lodge room. Education naturally forms a key part of the craft and by fostering those efforts we can find ways to meet the interest of Brothers and capitalize on efforts for retention that focus on those key efforts of the Lodge which should inevitably go hand in hand, education & fellowship.

### ***Working with the LEO***

- The Master should coordinate and communicate the vision that is in place for the year.
- Explain your expectations and hold the LEO to their execution as it relates to his duties

### ***Creating the Program-Work with the LEO or and Education Committee***

- Address membership interest
  - Additionally, consider the audience in relation to the makeup & masonic experience of those in your Lodge.
- Find balance in the topics and methods of instruction
  - Brothers will be more receptive when appealing to their learning methods but also interest, one presentation may appeal to all while another may be only interesting to a few brothers.



# Lodge Education Programs

## ***What exactly is Masonic Education?***

*Definition and explanation of potential nature of education*

## ***What Masonic Education Programs have you heard of or experienced that you enjoyed or would like to see again?***

**Designing a Lodge Education Program for a masonic year can be challenging and should address the interest areas, culture, and learning perspectives of Lodge members. It should also be fun! Education shakes the meeting up at times and is one of several way that you could say we differentiate ourselves from other Fraternities and groups. Working with the Lodge Education Officer can lead to a well-planned and engaging effort that keeps Brother’s attention and sparks their participation.**

Keep in mind, as Master of a Lodge you’re charged at installation **“to propagate the knowledge of the mystic art”** so education is one of the key parts of your role as Master!

**\*See Appendix VI & VII for a Masonic Year Education Planner & a Stated Communication Planner\***

## Integrating Education into the Lodge

Many Lodges struggle finding the right approach to education. This can be based on past habits or a lack of encouragement in the approach. To ingrate education into our Communications, Lodges need to actively realize it's important and make it a priority, rather than the exception that fits in occasionally, but won't when the business discussions take too long.

A good dialogue between the Master and LEO will begin the process for consistent education but it will also require the Lodge to allocate set time in your Lodge agenda. Allocating time and shifting it to earlier in the meetings rather than the tail (as many lodges traditionally do) can also bolster its effort.

Once time is set aside, we have to consider the approach and program development will necessarily build or shift the dynamic of the craft in attendance. Lodge education can cover a myriad of topics and be conveyed in many methods. These considerations fall to the goals for the program set by the Master & Officers and facilitated by the LEO.

### ***Education Programing approaches- Two main content areas***

**Esoteric(symbolic)-** *discussing the nature of a symbol, a deeper meaning of a degree, the mystery traditions, generally topics that are of a "tiled" nature*

**Exoteric-** *This could be a historical presentation, a local college professor discussing geometry, the Historical society discussing a local Brother, a Paramedic coming in & teaching the Lodge how to use a defibrillator, etc. These are the more "un-tiled" topics*

***Considering the above content areas, which would appeal most to your Lodge?  
Why? & Which would you like to see?***

# The Candidate Education Experience

The early interactions with our newest Brothers will serve to make or break their interpretations of the craft from a basic sense and can help solidify retention after they complete the degrees. Candidate Education makes vital connections for the Petitioner/new Brother and creates bonds with Brothers in the Lodge through mentorship.

## ***Candidate Education Programming***

- Establish a Mentoring program or system
  - Utilize the grand Lodge Mentoring Committees program or develop your own.
  - In either case- STICK TO THE PROGRAM- NO EXCEPTIONS, NO RUSHING, NO EXCUSES- hold the new Brother accountable to participate.
  - Encourage multiple Brothers to be involved in the program and work to involve multiple Brothers in the mentorship effort
- Assign a mentor to each petitioner.
  - Ensure this Brother understands the commitment, is knowledgeable, and comfortable in the role
- HOLD FIRST LINE SIGNERS ACCOUNTABLE & stress to them the importance of their active participation in the candidate process.
- Keep in mind that per Section 16.041 Candidates must be issued the HCPL pamphlets after they receive each degree AND they must be offered the opportunity to learn, and return said work in pen Lodge or to a Committee. However, it cannot be required.

## ***What can we include in the Candidate Education Program?***

- Grand Lodge Mentoring Program material
- Learning About Masonry Program (LAMP) Material
- Activities to involve the Candidate
  - Meet with the Brothers to discuss the degree and encourage a short discussion or presentation by them on a part of the work.
- Work with Brothers to develop a program “in-house”
- Utilize the “On the Threshold”, Entered Apprentice, etc. pamphlets
- ***KEEP IN MIND NO REQUIREMENTS CAN BE PLACED AS A BAR TO ADVANCEMENT***

No matter how you approach this, it should not be just the handing over paperwork or like material. Candidate education should involve meeting, discussions, and interactions.

**\*See Appendix VII for a Lodge Candidate Education Tracker\***



# Module 7: Notes







## APPENDICES

Material references in these presentations can generally be found on the Grand Lodge Database under the "My Resources" tabs

**APPENDIX I**

**Lodge Committee Worksheet**

**Audit Committee-** No less than 3 members appointed by the Master upon installation. per Section 9.035

<b>Audit Committee</b>
1.)
2.)
3.)

**Budget committee-** Consists of the Master, Secretary, Treasurer, & 2 Master Masons of the Lodge appointed by the Master upon installation

<b>Budget Committee</b>
Master-
Secretary-
Treasurer-
Master Mason-
Master Mason-

**Grievance Committee-** Appointed by the Master upon installation. To consist of not less than 3 nor more than 5 Past Masters in good standing and he shall additionally designate one as chairman. If a sufficient number of active resident Past Masters exist Master Masons in good standing may be appointed. The Junior Warden may not be a member of this committee. Per Section 29.010

<b>Grievance Committee</b>
PM-
PM-
PM-
PM-
PM-

**Delinquent Dues Committee-** No less than 3 members appointed by the Master upon installation. per Section 9.160

<b>Delinquent Dues Committee</b>
1.)
2.)
3.)

**APPENDIX II**

**Budget Example #1**

**Standard Lodge #103 A.F. & A.M.  
South Standard, Missouri**

**Receipts**

Dues (55.00 X <u>25</u> Master Masons).....	\$ <u>1,375.00</u>
Additional Contributions.....	\$ <u>1,000.00</u>
Petition Fees.....	\$ <u>125.00</u>
Standard Lodge #105(Temple Maintenance, Etc.) .....	\$ <u>900.00</u>
Fundraisers (Fish Fry) .....	\$ <u>975.00</u>

**TOTAL.....\$4,375.00**

**Expenses**

Grand Lodge.....	\$ <u>600.00</u>
<i>(Per Capita, Public Relations Assessment)</i>	
Insurance.....	\$ <u>1,100.00</u>
Utilities.....	\$ <u>1,600.00</u>
Refreshment Supplies.....	\$ <u>200.00</u>
Fundraisers (Fish Fry, Etc.).....	\$ <u>350.00</u>
Building Maintenance.....	\$ <u>250.00</u>
Candidate Supplies.....	\$ <u>200.00</u>
Secretarial Supplies/Postage.....	\$ <u>75.00</u>

**TOTAL.....\$4,375.00**

Respectfully Submitted:

\_\_\_\_\_  
W. Bro. Van Buren Master

\_\_\_\_\_  
W. Bro. Harrison, Secretary

\_\_\_\_\_  
W. Bro. Pierce, Senior Warden

\_\_\_\_\_  
W. Bro Tyler, Treasurer

Respectfully Submitted 09/23/16



**Budget Example #2**



Secretary

Standard Lodge #100 A.F. & A.M.  
Standard, Missouri  
W.: Bro.: J. Monroe, Master  
R.: W.: Bro.: J. Madison, P.M.,

**RECEIPTS**

Dues

\$85.50 X <u>68</u> Master Masons.....	\$ <u>5,814.00</u>
\$13.00 X <u>34</u> Master Masons.....	\$ <u>442.00</u>
OES Rent (\$125 x 10 months).....	\$ <u>1,250.00</u>
Fundraisers(estimate).....	\$ <u>3,300.00</u>
Miscellaneous use of Temple(estimate).....	\$ <u>125.00</u>
Anticipated New Member Fees & Misc. Income.....	\$ <u>650.00</u>

**TOTAL.....\$11,581.00**

**EXPENSES**

Grand Lodge.....	\$ <u>2,750.00</u>
(Per Capita, Public Relations Assessment, etc.)	
Insurance.....	\$ <u>3,100.00</u>
Utilities (Water/Electric/Waste) .....	\$ <u>1,650.00</u>
Office Expense.....	\$ <u>800.00</u>
Miscellaneous Expense.....	\$ <u>800.00</u>
Widows, Orphans, Local Charities.....	\$ <u>681.00</u>
Scholarships.....	\$ <u>600.00</u>
Refreshments.....	\$ <u>1,200.00</u>

**TOTAL.....\$11,581.00**

Respectfully Submitted:

-----  
W. Bro. J. Monroe, Master

-----  
R.W. Bro



## Budget Example #3

### Budget of Standard Lodge No. 101 October 2020-September 2021 (Fiscal Year 2021)

<b>Income</b>	<b>Budget</b>	<b>Actual</b>	<b>Proposed Budget for 2022</b>	
Book/Item Sales		\$0.00		
Lodge Dues	\$7,462.00	\$0.00	\$8,208.20	<b>Members Paying Dues to make budget</b>
Grand Lodge Dues	\$3,978.00	\$0.00	\$3,978.00	104
Individual Donations		\$0.00		
Petitions	\$2,000.00	\$0.00	\$2,000.00	Based on 10 new Members X \$200 Initiation
Total Income	\$13,440.00	\$0.00	\$14,186.20	
	<b>New Members</b>	<b>0</b>	<b>Proposed Budget for 2022</b>	
<b>Expense</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget for 2022</b>	
Grand Lodge Dues	\$3,978.00	\$0.00	\$3,978.00	\$38.25
Endowment Purchases/GL	\$0.00	\$0.00	\$0.00	
Lodge Charity Event Expenses	\$750.00	\$0.00	\$800.00	Expenses for any charity events that we wish to do
Lodge Charity Fund	\$200.00	\$0.00	\$225.00	charity gifts we want to give throughout the year
Social/Educational Event Expenses	\$500.00	\$0.00	\$550.00	Expenses for lodge social/educational events
Lodge Supplies	\$500.00	\$0.00	\$550.00	everyday Supplies
Initiation Supplies	\$2,000.00	\$0.00	\$2,000.00	Bibles/Aprons for Candidates, Educations Books from Grand Lodge, etc
Installation Supplies	\$150.00	\$0.00	\$165.00	Apron or gift for the outgoing Master and Expenses related to Installation of Officers
Insurance	\$350.00	\$0.00	\$385.00	Liability Insurance
Scholarship	\$500.00	\$0.00	\$750.00	
Meals	\$1,200.00	\$0.00	\$1,200.00	Reimbursement for JW receipts
Lodge Savings	\$746.20	\$0.00	\$820.82	Goal is 10% of total dues income
Temple Expense	\$2,700.00	\$0.00	\$2,700.00	Per rental agreement
Total Expense	\$13,574.20	\$0.00	\$14,123.82	\$111.29
Items Voted in Lodge not Budgeted			\$0.00	
<b>Surplus/Deficit</b>	<b>(\$134.20)</b>	<b>\$0.00</b>	<b>\$62.38</b>	<b>\$ per member</b>



## Budget Example #4

### Standard Lodge #110 A.F. & A.M. - 2020-2021 Operating Budget

Dates of Effective Budget: 01 September 2020 - 31 August 2021

Inflows		Description	Notes	Amount
		<b>Membership Dues</b>		
		Annual Dues	Dues and Fees. (160 Paying Members x \$76.00)	\$12,160.00
		Grand Lodge	Endowments.	\$750.00
		<b>Charitable Donations &amp; Fundraisers</b>		
		Funraiser Events	Crop Day, BBQ, Festivals, etc. (Estimated Amount)	\$5,000.00
		Masonic Charity Donations from Dues Overages	(\$3,093.46 paid to Lodge in addition to dues last year.)	\$3,000.00
		Other		
		Candidate Fees	Low Estimate of 2 per year @ \$200 each.	\$400.00
		Annual Transfer from Investment Accounts	Transfer to Lodge Checking each Quarter or as required.	\$56,578.00
		<b>Total Inflows</b>		<b>\$77,888.00</b>
Outflows		Description	Notes	Amount
<b>Line Item 1</b>		<b>LODGE ADMINISTRATION</b>	<i>Total Line Item to cover Lodge Administration.</i>	<b>\$24,220.00</b>
1	A	Bank Fees		\$150.00
		<b>Communications</b>		
1	B	Advertising Online / Social Media	Website and Facebook Design / Updating	\$400.00
1	C	Advertising Conventional	\$45 x 2 NW Cham of Com. Ads	\$90.00
1	D	Trestleboard	Printing and Mailing Costs for 100 copies per quarter	\$500.00
1	E	Phonevite		\$300.00
1	F	Event Management / Tickets / etc.		\$200.00
1	G	Shrine Page Ad and Circus Banner	<i>Banner to be given to Lodge after Circus.</i>	\$500.00
1	H	Lodge Zoom Account	Annual Fee plus 1 Upgrade for 500 capacity meeting.	\$175.00
		<b>Secretary / Treasurer Expenses</b>		
1	I	Dues Cards		\$50.00
1	J	Electronics & Software	Currently using Non-Profit Treasurer Program.	\$300.00
1	K	Misc Expenses		\$200.00
1	L	Office Supplies	Printer Toner, Paper, etc.	\$400.00
1	M	Postage	Dues Notices, Cards, etc.	\$1,000.00
		<b>Lodge Officer Wages</b>		
1	N	Sec., Treas, Org, Tiler, etc.	Treas-\$125x12; Sec-\$250x12; Tyl-\$40x20; Organist-\$40x20	\$6,100.00
		<b>Operating Expenses</b>		
1	O	Temple Board Dues	12 x \$500 per month.	\$6,000.00
1	P	Per Capita (Due Aug 2021)	Estimated with a 10% yearly increase. (\$6376.00 in 2020)	\$6,800.00
1	Q	Lodge Sanitation and Health Supplies	Masks, Hand Sanitizer, Sanitizing Wipes, etc.	\$800.00
		<b>P.R. &amp; Publicity</b>		
1	R	Civic Association Dues	Chamber of Commerce Annual Dues	\$75.00
1	S	MeetUp Online Account Fees	\$15 per month.	\$180.00
Outflows		Description	Notes	Amount
<b>Line Item 2</b>		<b>LODGE PHILANTHROPY</b>	<i>Total Line item to cover Lodge Philanthropy.</i>	<b>\$5,725.00</b>
		<b>Gifts and Donations</b>		
2	A	Local, Civic Charity & Emergency Relief	Fund for Local Charity throughout the year.	\$1,000.00
2	B	Widows & Orphans Fund (Per By-Laws)	<i>Remainder to be transferred to Edward Jones Account.</i>	\$500.00
2	C	Masonic Charity & Relief	Requests from Grand Lodges / Masonic Service Assoc., etc.	\$1,000.00
2	D	Masonic Funerals	\$75 per Brother. (Estimated at 8 for the year.)	\$600.00
		<b>Masonic Charities</b>		
2	E	Children's Foundation		\$175.00
2	F	DeMolay (Local Chapter)		\$175.00
2	G	Job's Daughters (Bethel #XX)		\$175.00
2	H	Missouri Lodge of Research		\$175.00
2	I	Masonic Home		\$700.00
2	J	Rainbow Girls		\$175.00

Outflows		Description	Notes	Amount
Line item 6		<b>MISCELLANEOUS EXPENSES</b>	Total Line item to cover Miscellaneous Expenses.	<b>\$2,300.00</b>
6	A	Master's Discretionary Fund		\$750.00
6	B	Master's Jewel / Endowment		\$1,000.00
6	C	Past Master's Apron & Case		\$550.00
Outflows		Description	Notes	Amount
Line item 7		<b>INCOMING MASTER'S EXPENSES</b>	Total Line item to cover Incoming Master's Budget Gap.	<b>\$3,250.00</b>
7	A	Officer Installation	Installation for 2021-2022 Officer Line.	\$2,000.00
7	B	Past Masters' Dinner	August 2021.	\$750.00
7	C	Incoming Master's Discretionary Fund		\$500.00

## BUDGET SUMMARY

<b>INFLOWS:</b>	Lodge Income	\$77,888.00
<b>OUTFLOWS:</b>	Lodge Administration	\$24,220.00
	Lodge Philanthropy	\$5,725.00
	Lodge Education	\$3,858.00
	Lodge Meals / Refreshments	\$19,550.00
	Masonic Events	\$18,985.00
	Misc. Expenses	\$2,300.00
	Incoming Master's Expenses	\$3,250.00

Total Inflows:	\$77,888.00
Total Expenses:	\$77,888.00
Over / Under Budget Amount:	\$0.00



## APPENDIX III

# 3-year Calendar-Example

### Standard Lodge #101 - 3 Year Plan

**Mission:** Standard Lodge #101 is committed to remaining active in the community where we were chartered as well as in the community where we currently meet.

**Vision:** Standard Lodge #101 seeks to create a warm and inviting Lodge presence in the community and grow Lodge membership through visible community involvement and tangible fellowship benefits to membership.

**Values:** Standard Lodge #101 values visible community involvement and support of the city and County schools and children in addition to the broad core Masonic values of Temperance, Fortitude, Prudence, and Justice.

#### **2018**

09/02/2018 - Stated Meeting/Installation of Officers

09/22-24/2018 - Grand Lodge Session

10/07/2018 - Stated Meeting

11/04/2018 - Stated Meeting

12/02/2018 - Stated Meeting

12/06/2018 -Christmas on the River Cider/Hot Chocolate (Vision-based event)

01/06/2019 - Stated Meeting

01/11/2019 - Lodge MOCHIP (Vision-based event)

02/03/2019 - Stated Meeting

02/23/2019 - Charity Pool Tournament (Vision-based event)

03/03/2019 - Stated Meeting

04/07/2019 - Stated Meeting

05/05/2019 - Stated Meeting

05/23/2019 - Lodge Baseball Outing (Vision-based event)

06/02/2019 - Stated Meeting

06/28/2019 - Widows and Past Masters' Fish Fry (Vision-based event)

07/04/2019 - 4th of July Parade (Vision-based event)

07/07/2019 - Stated Meeting

07/26/2019 - Lodge Participation in the District C2A Class

08/04/2019 - Stated Meeting - LODGE ELECTIONS

**2019**

- 08/21/2019 - Installation of Officers
- 08/23/2019 - Turkey Legs Booth (Vision-based event)
- 09/01/2019 - Stated Meeting
- Fall 2019 - Charity Boxing Match Planned (Vision-based event)
- 09/28-30/2019 - Grand Lodge Session
- 10/06/2019 - Stated Meeting
- 11/03/2019 - Stated Meeting
- 11/21/2019 - Christmas on the River Cider/Hot Chocolate (Vision-based event)
- 12/01/2019 - Stated Meeting
- 01/05/2020 - Stated Meeting
- 01/10/2020 - Lodge MOCHIP (Vision-based event)
- 02/02/2020 - Stated Meeting
- 03/02/2020 - Stated Meeting
- 04/06/2020 - Stated Meeting
- 05/04/2020 - Stated Meeting
- 05/23/2020 - Lodge Baseball Outing (Vision-based event)
- 06/01/2020 - Stated Meeting
- 06/28/2020 - Widows and Past Masters' Fish Fry (Vision-based event)
- 07/04/2020 - 4th of July Parade (Vision-based event)
- 07/06/2020 - Stated Meeting
- 08/03/2020 - Stated Meeting - LODGE ELECTIONS

**2020**

- 08/29/2020 - Installation of Officers
- 09/07/2020 - Stated Meeting
- 09/27-29/2020 - Grand Lodge Session
- 10/05/2020 - Stated Meeting
- 11/02/2020 - Stated Meeting
- 11/20/2020 - Christmas on the River Cider/Hot Chocolate (Vision-based event)
- 12/07/2020 - Stated Meeting
- 01/04/2021 - Stated Meeting
- 01/09/2021 - Lodge MOCHIP (Vision-based event)
- 02/01/2021 - Stated Meeting
- 03/07/2021 - Stated Meeting
- 04/04/2021 - Stated Meeting
- 05/02/2021 - Stated Meeting
- 05/23/2021 - Lodge Baseball Outing (Vision-based event)
- 06/06/2021 - Stated Meeting
- 06/28/2021 - Widows and Past Masters' Fish Fry (Vision-based event)
- 07/04/2021 - 4th of July Parade/Turkey Legs Booth (Vision-based event)
- 07/04/2021 - Stated Meeting

08/01/2021 - Stated Meeting - LODGE ELECTIONS

The Master and Wardens of this Lodge for the Ensuing Year agree to and endorse this three-year plan:

\_\_\_\_\_ WM

\_\_\_\_\_ SW

\_\_\_\_\_ JW



## APPENDIX IV

# AGENDA EXAMPLE 1

### Agenda

Standard  No 101 A.F. & A.M.

July 20th, 2020 AL 6020

- I. Pledge of Allegiance and Opening in Due Form on all 3 Degrees
- II. Draping of Charter & Reading of Record- W. Bro. Tom Doe
- III. Offer of (Symbolic) Fraternal seat in the East to all RWBs and W. Bros.
- IV. Reading (Approval) of unapproved minutes (posted/ provided prior to Com.)
- V. Treasurer's Report \_\_\_\_\_
- VI. ~~Report of Committees on Petition~~
- VII. Petitions presented
- ~~VIII. Report of Standing Committees~~
- IX. Report of Select Committees-
  - a. GLAA Points Committee- Submitted on 7/8- Final Points total **2160**
    - i. Honor Lodge with Distinction Qualified
  - b. MHM Paverstone Fund Committee- Prior to tonight \$**398.28**
  - c. Trestleboard Committee-Issue out last week
  - d. Fish Fry Committee- Jr & Sr. Warden
    - i. Result so far? \_\$320 as of 6/26/2020\_\_
    - ii. Status on letters
  - e. Lodge By-Laws Review Committee- Review for further changes if any and authorization for reprint following review and final changes.
    - i. R.W. Bro. Washington, Bro. Adams, R.W. Bro. Jefferson, R.W. Bro. Revere.
- X. Motions and Resolutions
- XI. Unfinished Business
  - a. Inquiry on database- Mr. John Doe- Have made phone & email contact
- XII. Communications-
  - a. Others on Secretary's desk
- XIII. Sickness and Distress-
- XIV. Misc. Business-
  - a. Masonic Funeral Service- Bro. Johnson- July 25<sup>th</sup>-10:45am
    - i. First Christian Church
    - ii. W. Bro. Jefferson, presiding & will gather materials
    - iii. Who else can attend or is available?
  - b. Masonic Education "The Noachites: Masonry's Original 3<sup>rd</sup> Degree Allegory?"
  - c. District/Area Happenings
    - i. Standard Lodge 301 Installation of Officers- August 15<sup>th</sup>, Noon meal, 1 Installation
  - d. Announcements if any by Officers-Elect
    - i. Open Installation of Officers- August 3<sup>rd</sup>
- XV. Adjourn and Close in Due Form

# AGENDA EXAMPLE 2

## AGENDA

7/6/2021

Lodge opened at 7:30 pm on the 1<sup>st</sup> degree. 2nd, 3<sup>rd</sup>?

The following **INSTALLED** officers were present:

WM-	SW-	JW-
Treas-	Sec-	Chap-
SD-	JD-	SS-
JS-	MAR-	Tiler-
LEO-	Mas Home Rep -	Musician-
Total attendance _____	Visitors _____	Time lodge closed _____

**Minutes** for 6/15 approved as posted?

**Treasurer's report**—Treasurer's reports for .....

**Petitions Presented** –

**Report/balloting on Petition for Degrees**

**Unfinished business-**

Open items are Hope House and Lodge "To Do" list  
Read proposed Legislation for 2021 annual meeting.

**Committee reports**—

**Motions & resolutions in writing**—

**Communications-**

**Sick/distressed--** Go to our list to pray.

**Moment of silence**—The WM called for a moment of silence for the men & women in this country who are in harm's way and their families

**New business**—

**Visitation-**

**Education**

**Good of Freemasonry**—Study Club Thursdays at 7 pm.



## SUGGESTED\* ORDER OF BUSINESS

1. The unapproved minutes shall be read and approved
2. Unfinished business
3. Reports of committees on petition
4. Petitions presented
5. Report of standing committees
6. Report of select committees
7. Sickness and distress
8. Motions and resolutions
9. Miscellaneous business

\*Taken from the *Masonic Manual of Missouri*, p. 105

Note that dependent on your Lodges habits as well as perhaps even the edition of the Manual, you may have a very similar order of business with slight additions or variance dependent on when it was drafted.

**APPENDIX V**

**What do you need to have ready on the evening of the Official Visit?**

*While not exhaustive the below form will help you prepare material that the DDGM will request to see or need made ready to complete his report for your Lodge. Please have these materials gathered or suitable responses ready for his arrival.*

10. Budget

- a. Has a budget been submitted and approved at a Regular Stated Communication for this Masonic Term (*Grand Lodge bylaws stipulate this occurs at the 2<sup>nd</sup> Stated Communication in a Term (after installation) or earlier?*)

**Y                      N**

- b. Was a budget submitted for last Masonic Term?    **Y                      N**

**c. *Have copy of budget ready for review.***

11. Audit

- d. Has the Audit been completed yet?    **Y                      N**

12. Dues and Fees

e. Dues (including Per Capita) \$ \_\_\_\_\_

f. Total Initiation Fee \$ \_\_\_\_\_

13. Ownership Status of the Temple/Building

- g. Do you:

**Own                      Rent                      Temple Association**

*(If under Assoc. ownership, is the Association compliant with Grand Lodge bylaws? 9.070-9.100)*

14. Insurance Status (if Temple is owned)

h. Amount insured for?? \$ \_\_\_\_\_

15. Does the Lodge implement any form of Strategic/Long -Term planning?

**Y                      N**

- i. Does the Lodge have a 3-Year Plan?    **Y                      N**

**j. *Have a copy of the plan ready for review.***



16. Does the Lodge offer any form of Newsletter?      **Y**                      **N**  
k. How is it distributed (circle those that apply)?

**Mail    Email    Other(specify)\_\_\_\_\_**

17. Does the Lodge use Social Media? (circle those that apply)

**Facebook    Twitter            Webpage            Instagram            Other**

l. What handles or addresses are active for the above question?  
(please list):

18. Does the Lodge appoint all necessary committees as directed by the Grand Lodge Bylaws?

***m. Please provide a list of all committees and appointed brothers for review.***

19. Masonic Home Representative: \_\_\_\_\_

20. Lodge Education Officer: \_\_\_\_\_

***21. Please have on hand the Lodge's most recent Bylaws***

22. When is the Annual Election of Officers?

\_\_\_\_\_  
\_\_\_\_\_

23. When is the Annual Installation of Officers?

\_\_\_\_\_  
\_\_\_\_\_



**APPENDIX VI**

**Lodge Education Program**

<b>Lodge Education Officer:</b>	
<b>Email:</b>	
<b>Phone:</b>	

Month	Stated Communication	Stated Communication	Special needs
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			G. Washington Observance- Grand Lodge Resolution
December			

**APPENDIX VII**

**Education Program Planner**

This form is to be completed by the LEO or Brother planning the Education. A copy then should be submitted to the Master, Secretary, & Wardens for awareness prior to the scheduled night and to facilitate any additional arrangements that may need addressed.

<b>Meeting Date:</b>		<b>STATED or SPECIAL COMMUNICATION</b> (Circle one)
<b>When will presentation occur:</b> (Circle one)	<b>Prior to Lodge</b> <b>Beginning of Communication</b> <b>Middle of Communication</b> <b>At end of Communication</b> <b>After Lodge Closes</b>	
<b>Presenter:</b>		
<b>Presenter Contact info:</b> (if not a member of the Lodge)		
<b>Topic:</b>		<b>OPEN or CLOSED</b>  <b>EA    FC    MM</b>  (Circle options that correspond)
<b>A/V, Internet, Other Tech Needs</b>		
<b>Cost (if applicable) &amp; For what:</b>		
<b>Special Considerations:</b>		
<b>Brother serving as Point-of-Contact with Presenter</b>		
<b>Marketing to Other Area Lodges? How?</b>		

# APPENDIX VIII

Candidate Educational Progress Tracker									
Petitioner/Candidate Name	Date Elected	Mentor Assigned/ Who?	On the Threshold Education Complete	Initiated an Entered Apprentice	Post-Entered Apprentice Education Complete	Passed to the Degree of Fellowcraft	Post-Fellowcraft Education Complete	Raised to the Degree of Master Mason	Post-Master Mason Education Complete
1	John H. Doe 1/21	A. Gamble	2/10/1822	3/11/22	3/20/22	4/9/22			
	<i>Candidate Interests/Notes:</i> Interested in esoteric topics as well as the local lodge history. Wants to help with the lodge library								
2									
	<i>Candidate Interests/Notes:</i>								
3									
	<i>Candidate Interests/Notes:</i>								
4									
	<i>Candidate Interests/Notes:</i>								
5									
	<i>Candidate Interests/Notes:</i>								
6									
	<i>Candidate Interests/Notes:</i>								