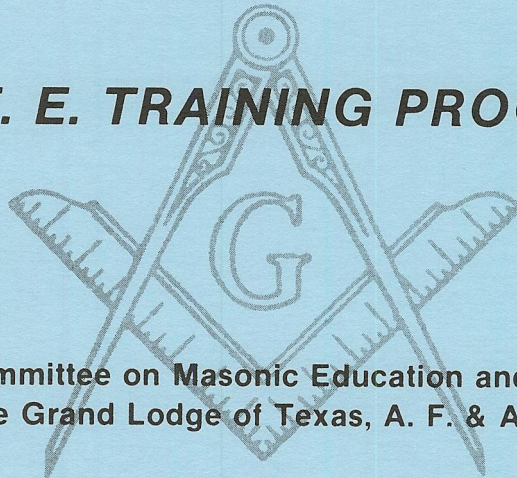


■ *LODGE INSTRUCTION FOR EFFECTIVENESS* ■

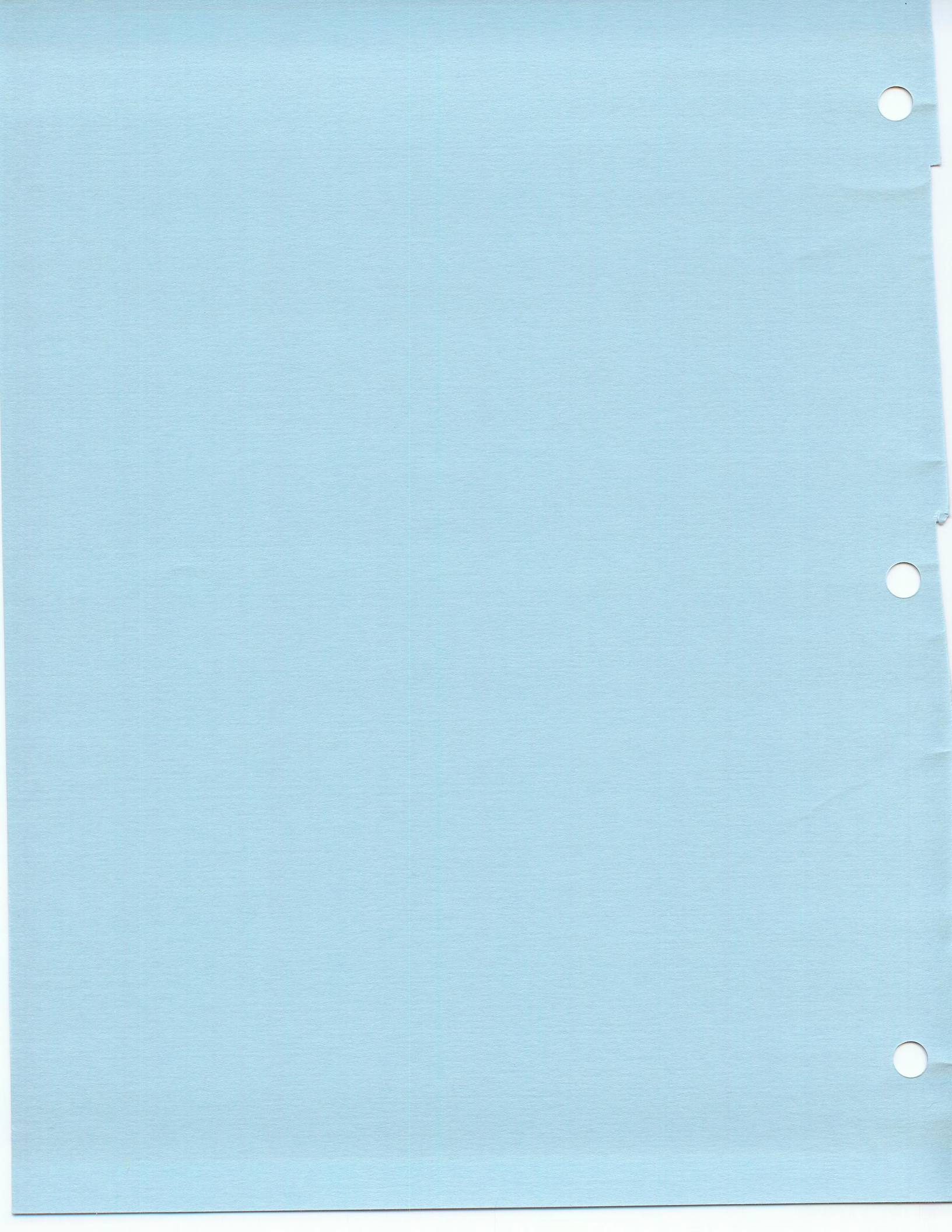
PREPARING TO BE MASTER *(ADMINISTRATION)*

L. I. F. E. TRAINING PROGRAM



The Committee on Masonic Education and Service
The Grand Lodge of Texas, A. F. & A. M.

■ *LODGE INSTRUCTION FOR EFFECTIVENESS* ■



CONTENTS

	PAGE
INTRODUCTION	ii
Exercise No. 1 - DUTIES AND RESPONSIBILITIES	M-1
Exercise No. 2 - COMMITTEES	M-3
Exercise No. 3 - PLANNING ACTIVITIES	M-5
Exercise No. 4 - BALLOTING GUIDE	M-7
Exercise No. 5 - FINANCES AND BUDGET	M-10
Exercise No. 6 - LAW AND TRADITION	M-13
Exercise No. 7 - BY-LAWS	M-15
Exercise No. 8 - INVESTIGATING COMMITTEES	M-17
EXERCISE RECORD	M-19
MAIL IN COMPLETION FORM	M-19

CONTENTS

PAGE	
ii	INTRODUCTION
M-1	Exercise No. 1 - DUTIES AND RESPONSIBILITIES
M-3	Exercise No. 2 - COMMITTEES
M-5	Exercise No. 3 - PLANNING ACTIVITIES
M-7	Exercise No. 4 - EVALUATING QUALITY
M-10	Exercise No. 5 - FINANCES AND BUDGET
M-13	Exercise No. 6 - LAW AND TRADITION
M-15	Exercise No. 7 - BYLAWS
M-17	Exercise No. 8 - HAVE-TIME COMMITTEES
M-19	EXERCISE RECORD
M-19	APPENDIX A - SAMPLE FORM

INTRODUCTION

Today, unless something is complicated, we seem to believe it to be of little value. To illustrate, a man was recently overheard saying, "If the safety pin had been invented in this generation, no one would use the darn thing unless it had six moving parts, two transistors and had to be serviced twice a year!"

This very attitude requires that we periodically turn to the simplicity of FUNDAMENTALS which so often get lost in the complexities of modern-day life.

It has long been recognized by Masonic Educators of Texas that a basic training program for lodge officers is a vital necessity if we are to see improvement in the operation and leadership in our constituent lodges. It has also been recognized that such a program must be equally applicable to all lodges regardless of their size or location. The ultimate purpose of this program is to provide a basis for improving the effectiveness of the leadership in the individual lodge. For this reason, the program is entitled "**Lodge Instruction For Effectiveness.**"

* * THE L. I. F. E. PROGRAM * *

The program is divided into three (3) parts or areas. Each portion of the program prepares a brother for one of the principal offices of the lodge. The total program is scheduled under normal circumstances, to be completed over a three (3) year period. An exercise and discussion manual will be used to cover and guide the activities for each of these areas. The first of the areas is the Introduction area, the activity that prepares a brother to be Junior Warden. This part of the program should be worked by anyone who would hold that office. The second area addresses Operation and prepares a Mason to be the Senior Warden. Administration is the third area and covers the things to prepare a Warden to be the Master of the Lodge.

This program uses a guided, "hands on", approach to present a series of self-help study exercises. These study exercises address "how to" subject areas that are relative to the week-to-week functions of the lodge. It is stressed that the exercises of this program are purely of a practical nature and are so constructed that they are applicable to all lodges, large or small, urban or rural. Further, the program is a continuing program, applicable in any year, and requires a minimum of administrative support.

Learning activities are contained within each exercise. These activities are centered around lodge tradition rather than on a fixed text book approach. The exercises are presented in written format, but how they are completed and their completeness is based on the knowledge and guidance of a local lodge brother. These brothers are known as **Lodge Counselors.**

The Worshipful Master is responsible for the appointment of a Lodge counselor (*usually an active brother and Past Master*) who will manage the program within his lodge. This counselor is the key to the program; he works with each of the officers to complete their exercises and certifies their completion for both personal and lodge recognition. By necessity, this individual must be well rounded, experienced as a lodge officer and be knowledgeable in Masonic law, lodge operation, and all three degrees. It can also be the responsibility of the Worshipful Master to replace the Lodge Counselor if the program is not progressing.

Our fraternity almost universally accepts the belief that as a man joins our brotherhood, he must do some proficiency work after each degree. Although the length of that work and exactly what is required may vary from one Grand Jurisdiction to another, we each must show that we are willing to work, learn and perform. The strength in this approach lies in doing, in the participation itself. This program follows that approach. If the exercises are completed within the context of your own lodge and its traditions, you will be better prepared to lead and guide your lodge.

The Committee on Masonic Education and Service, Grand Lodge of Texas, will manage and provide administrative support for this program. The members of this committee feel that the officers who complete this training program should be recognized by the Grand Lodge. In order to do this, we have been authorized by the Grand Lodge to award a wallet-size card to the individuals who complete the program.

Cards that certify completion of each section have been mailed to each lodge. Upon completion of a section of the program, the Lodge Counselor is authorized to complete the appropriate card, sign it, and award it to the brother. The Lodge Counselor then completes one of the forms in the back of each book and sends it to Grand Lodge for their records.

Lodge Certificates for completion of all three programs are no longer available.

* * *

Recommendations or questions should be directed to

**Committee on Masonic Education & Service
Grand Lodge of Texas
P.O. Box 446
Waco, Texas 76703**

Our primary concern is to ensure that the quality of the work is maintained in
the face of these changes. We are confident that the staff will continue to
provide a high standard of service to our customers. We will be working
with you to ensure that the transition is as smooth as possible. We will
be providing you with a detailed plan of the changes and the steps we
will be taking to ensure that the service is not affected. We will be
contacting you regularly to discuss the progress of the changes and to
ensure that you are satisfied with the arrangements. We will be happy to
provide you with any further information that you may require. We will
be working with you to ensure that the transition is as smooth as possible.

The Committee on Internal Relations and Finance, Grand Lodge of Texas, will be
providing administrative support for the program. The members of the
Committee will be working with you to ensure that the program is
administered in a fair and equitable manner. We will be providing you
with a detailed plan of the changes and the steps we will be taking to
ensure that the service is not affected. We will be contacting you
regularly to discuss the progress of the changes and to ensure that you
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that the transition is as smooth as possible.

Large Committee on Internal Relations and Finance, Grand Lodge of Texas

For further information, please contact the Grand Lodge of Texas

Grand Lodge of Texas
P.O. Box 1415
Waco, Texas 76782

PREPARING TO BE MASTER - EXERCISE NO. 1

* * DUTIES AND RESPONSIBILITIES * *

You've heard the formal charges at installation. You have the Monitor of the Lodge. You have a copy of the Grand Lodge Laws. So you know the formal declaration of what you are **expected to do**. Now let's deal with it as it may come to you day to day.

Worshipful Master

The highest office in the lodge is unlike that same office in any other organization. The **Worshipful Master's** position is awesome. The actions of the Master are subject to review only by the Grand Master of the Grand Lodge of Texas. That's a **huge responsibility!** On the other hand, all you have to do is to remember to rule and govern in line with all the Masonic teachings you will have learned while on your way to the East.

Some Masters enter the East and do nothing more than maintain the customary situation. That may be best, but when you do only what has been done, something will surely fall through the crack, and next year there will be one less thing for that Master to do -- until finally, **nothing is left**. Your year as Master should be an expression of your enthusiasm for Masonry. There are many regulations governing what a lodge can do, but there are many activities and projects that have not been touched. **Activity** is the **life blood** of your lodge. Create activities and use your officers and members to put these together. Has your lodge ever had a 4th of July picnic? Do it this year, or on any date you prefer. Has the Mayor of your town ever addressed your lodge? **He could!** Masonic Widows are talked about -- form a committee to go **visit some** of them. Your lodge **needs some** repairs -- **appoint** a brother acquainted with maintenance as chairman of the committee, and you may be pleasantly surprised at the new coat of paint or the donated shrubbery that improves your lodge appearance. These are only a few basic activities. You can think of others that fit your lodge better, but any of them will be **activity -- Life Blood**.

Senior Warden

All too soon you will be in the East. Your job right now is to **assist** the Worshipful Master and **preside** in his absence. Other duties are prescribed in Grand Lodge Law and in your By-Laws, but let's look at what is creeping up on you. Your essential job at this point also involves finishing your planning for next year. Observe and learn from what you see this year -- **it's your turn next**. You should have a calendar of required and customary activities for next year. Your committees should be outlined and the members named. Got something new you're going to do? Research it and discuss it with others just to be sure it will get off the ground. By the time it's your turn to handle the gavel, you'll only have to execute your plan -- **not make it, too!**

Junior Warden

As Junior Warden you are the lodge lawyer and, hopefully, you have a good start at learning the law, or at least **how to** find it when you are asked. Keep your book handy -- no telling when it's needed. Keep brushing up now, so you can really be a help.

Other than the duties set out in Grand Lodge Law and your By-Laws, this is when you should begin your planning for the East. You should observe what is required and customary and make notes for improvements. If you don't do this, next year your question will be "What did they do last year?" This is a good time to **list the committees** you will want. Some will escape you if you don't write them down. You have probably been appointed to head several committees. This is good experience for planning, and your committee members can benefit by observing your efforts to assign them tasks and complete your job.

In addition to the duties of the three principal officers, you will find many traditional duties of other officers. These vary from lodge to lodge, but if you observe and ask questions, you will be prepared when you need to see that a job is done. You might want to start a tradition **yourself**. Somebody did!

* * **LEARNING ACTIVITY** * *

Now that you've seen some of the day-to-day duties, let's see if you can find where they are formally documented. The first activity is to list the Chapter number, in Grand Lodge Law, that describes the officer's duties:

WORSHIPFUL MASTER . . . Chapter Number _____

TREASURER Chapter Number _____

SECRETARY Chapter Number _____

Counselor's Initials _____

* * *

By-Laws are **another source** for the assignment of duties. The second activity is to review your Lodge's By-Laws to see if any specific duties are assigned. If not, **should there be?**

Counselor's Initials _____

* * *

Most lodges have some **traditional assignments**. Examples: The Junior Warden chairs the refreshment committee. Someone is responsible to open and close the lodge building. Some officer, perhaps the Senior Deacon, is responsible for conducting floor practice. The third activity is to develop a **list of traditional assignments** for your lodge. Discuss these assignments with the Lodge Counselor to see if any changes or additions are needed.

Counselor's Initials _____

PREPARING TO BE MASTER - EXERCISE NO. 2

* * COMMITTEES * *

Some people say that a giraffe looks like it does because it was put together by a committee. The giraffe likes it, and **it works**. You can look at that animal as the input of different ideas to make a whole decision.

When you are the Master, or when you are in charge of a certain job, you will want to be sure that all possibilities and available facts have been considered before you get a final result. It's awfully lonely out there when you have made a decision, and it turns out that you didn't have all the facts and **other people do**.

There are two types of committees in lodges: "**Standing Committees**" and "**Special Committees**".

Standing Committees usually consist of those on Charity, Sickness and Distress, Finance, and other matters that are on **on-going** permanent concerns of the lodge.

Special Committees are created for special needs, they may be for a **one-time** use or might have a **continuing** use during the year.

Committees are a wonderful **tool!** Consider the benefits.

1. Involvement in the affairs of the lodge by being part of a committee is one of the very best ways to inspire the interest of that "*newly-raised*" or "*might become active*" brother.
2. A large job can easily be separated into small chores by an efficient committee chairman, and nobody needs to be **over-worked**.
3. When a project requires many types of talent and knowledge, you can draw on several people to cover all these needs.
4. Controversial motions or ideas that may get nowhere -- **or worse yet** -- get out of control - can be referred to a committee. **What!** The motion has been made and seconded and it's time to vote? You can refer it to a committee if you feel that it's not in the **best interest** of the lodge or that it needs further study. You're the Master -- **do it!** Avoid ill-considered motions and controversy, but remember that since you are the Master, **fairness must prevail**.

Just as with any job, a committee member **must know** what is expected of him.

First comes the **purpose** of the committee. The job that needs to be done must be clearly defined for the committee to do its job properly. There probably will be specific items to be done or special conditions to be met. Lay these out **carefully** if you want the right result.

A chairman **must be appointed**, or everybody thinks the other guy is carrying the ball.

The kind of report expected **must be spelled out** to permit the committee to give what is expected.

A **time for completion** is a must and should be spelled out clearly with the assignment.

Good experience can be gained by any officer who works with a committee. By that association, he will learn the ingredients that go into a productive committee. He can also learn the problems so that, later on, he can understand what helps and hurts in the formation, coordination, and completion of the committee assignments. **Use** the officers -- or **lose** their interest.

You gave the job to a committee -- **now let them work!** I'm sure you've heard this, but the rest of the story is ... keep track of progress with **your fingers**, not with **your hands**. If you get in too heavily, you will have taken the job away from them, and you've lost the whole purpose. If you blindly **assume** the job is being done, you may find out that a **little interest** in their work would have accomplished the goal, but instead, the results are **zero**. You need the **right touch**, and perhaps, **some encouragement** at times.

Do you have a large, important event for a committee? Maybe an annual dinner to honor wives and widows of Past Masters or District Deputies? In this type of function you might sit down with a committee and set several **target dates** for completion of various phases of the whole function. Use of a calendar by the committee can show the way to do their work and not end up jammed for time. Suggest **working backward** on the calendar from the desired date. **It works.**

The **importance** of committees should not be overlooked. Their use promotes democracy, involvement, and the sharing of the work of the lodge.

* * **LEARNING ACTIVITY** * *

Some lodges use many committees, some use few, and some assign committees which **do nothing**. The first activity is to identify at least two committees in your lodge: one **Standing Committee** and one **Special Committee**. Explain their functions and benefits.

Counselor's Initials _____

* * *

If this was your year as Master, you would have to deal with the question of committees. The second activity is to make a list of committees you think you might have if it were your year. **Pick a chairman** of each committee, and explain why you picked him.

Counselor's Initials _____

* * *

Committees are a **very important factor** in the management of a lodge. Those who are part of one, help to run the lodge. The third activity is to participate in a committee and give a report to your lodge. Discuss with your Lodge Counselor how that committee functioned and suggest possible ways of improvement.

Counselor's Initials _____

PREPARING TO BE MASTER - EXERCISE NO. 3

* * **PLANNING ACTIVITIES** * *

There is more to planning a special lodge event than just selecting a date for the event. There are probably few things in this world more enjoyable than the aroma and taste of fresh home-made bread. To enjoy this delicacy, unfortunately, requires more than a statement that "*I shall sit down at five o'clock this evening and enjoy a slice of home-made bread with my favorite preserves!*" To enjoy an experience such as this requires a measure of planning. Assuming the bread is not yet baked, it requires that a recipe and various cooking utensils be available. It requires time to follow the instructions provided in the recipe. It requires the agonizing period required to bake the bread. But if all goes well, the time spent in planning and performing the various preparatory activities is well worth the effort. Just as there is more to enjoying fresh baked bread than deciding when it will be consumed, there is more to planning a special lodge function than just selecting the date for the event.

Just as enjoying home-made bread requires preparation, most social events require preparation. Before describing the preparation or "*planning*" process in greater detail, it will be well to agree on a few basic definitions. First, let us define an **EVENT** as something that takes place at a specific time or date. Let us define an **ACTIVITY** as an action that requires a particular amount of time to perform and is required in the preparation for a given **EVENT**. In fewer words, it requires one or more preparatory **ACTIVITIES** to prepare for a scheduled **EVENT**.

Each preparatory activity requires time. Some such activities may require only a few moments of someone's time. Other activities may require weeks or even months. The important thing is to make an estimate of the time required to accomplish each individual preparatory activity. This is the only means to determine how much "*lead time*" is required to start an activity in order to have it completed in time for the big event. The most accurate means of establishing this estimate is to encourage an estimate from the person assigned to the task. After all, he is the one who is giving of his time to accomplish the assigned activity.

Most preparatory activities require human effort. The only way to get something done is to do it yourself or find some other person willing and able to perform the activity for you. As a planner, try not to load yourself down with too many activities for which you are responsible. A more effective approach is to solicit volunteers. This leaves you, as the planning coordinator, free to deal with the unexpected and to see that the various preparatory activities are performed without too many problems and also be in a position to report to the lodge, from time to time, the progress of your group of volunteers.

Some activities are dependent upon the completion of previous activities. As an illustration, the activity "**LOCATE 20 TABLES**" logically must precede the activity "**ARRANGE TABLES IN DINING ROOM**". Recognizing these relationships is important because, as can be seen, if it has been estimated one week will be required to "**LOCATE 20 TABLES**", and it has been estimated that a week will be required to "**ARRANGE TABLES IN DINING ROOM**", then we are talking about **TWO** weeks. Without recognizing this simple arithmetic, activities can "*pile-up*" on that evening just before that special event.

The amount of detail required in the planning process is usually related to the complexity of the event and the resources required both in planning for the event and the resources required for the event itself. Allowing any individual activity to "drag-out" beyond its original estimated completion time can often seriously jeopardize the overall plan. The overall plan must be constantly reviewed in terms of progress and problems. The rewards of good planning are numerous.

* * **LEARNING ACTIVITY** * *

There is only one activity to this exercise. We will walk through the steps to help plan an event. This can be hypothetical, or even better, one of your lodge's forthcoming functions.

Step 1. Describe a special event. Select a date and time for the event, taking into consideration other area events, both Masonic and other.

Step 2. List ten or more things-to-do that must be accomplished to prepare for the event. Examples: Commit the meeting place; engage the speaker; contract the caterer; print the tickets; mail the notice to members; mail special invitations to dignitaries; invite other lodges and Masonic-affiliated organizations; commit your master of ceremonies, the minister who will give the invocation; develop and print the program, etc.

Step 3. Decide which of these activities depend upon another activity. Example: Do you introduce guests before or after the main speaker?

Step 4. Estimate how long each activity will take, and work backward from the date of the event to establish starting and completion dates for each one.

Step 5. Review your plan. Recheck each step to be sure things are "fitting together." Adjust as necessary.

Step 6. Now to the tough part: Select individual members who are able, and more importantly, willing to perform each of the activities you have listed above. Review the activity with each one, and get his reaction to your time estimates. Adjust as necessary to be sure the plan will work. Finally, impress upon your volunteers the importance of keeping everything on schedule.

Step 7. You should now have a comprehensive plan. It remains for you to "conduct" the operation just like a band leader, getting input from each member of the team as to their progress, in order to be sure that nothing "falls through the crack."

Step 8. Even if the above has been only an exercise, review it thoroughly with your Counselor. You simply cannot get too much practice in planning special events. The **smallest** details are vital. If you have planned a real event, do a "post-mortem" review with your Counselor.

Counselor's Initials _____

PREPARING TO BE MASTER - EXERCISE NO. 4

* * **BALLOTING GUIDE** * *

It is your turn in the EAST. Perhaps the Master is absent and you are filling his station, or maybe you have finally made it to the EAST. Just about the time you begin to feel comfortable (*you have gotten the lodge opened*), the Secretary informs you that you have a Petition for Waiver of Jurisdiction. **What happens now?** What do you do?

There are bound to be some brothers present who know what you should do. You want to avoid embarrassment, and the Junior Warden will take a good while to look it up in the Grand Lodge Law Book. You want to save time, but most of all, **you want to do it right**. Do you appoint a **committee**? Does it **lay over** for a lunar month (*28 days*)? When it comes to the ballot, itself, **who can vote**? Could you accept a **protest** if one were to be made? You assume the vote is to be taken by ballot rather than voting by show of hands. **Is it?**

Your knowledge of the right thing to do is an important part of keeping your lodge running smoothly. It is all a part of leadership, too -- knowing **where to lead**. Probably very few Masters have known the answer to all these questions, but most know where to find the answers.

This exercise is intended to let you find the answers, and it will give you a handy form that you can complete, showing the correct article number of the Grand Lodge Law applicable to the specific situation. When you have completed this balloting guide, it will give a ready reference to some of the answers you will surely need. You might even cut it out and paste it in the back of your Monitor or Law Book.

* * **LEARNING ACTIVITY** * *

You are going to find that just about no petition is handled like any other. That is for a very good reason. No situation is exactly like any other; therefore, there are different requirements. The activity of this exercise is to complete a provided chart. It has empty blocks where your answer should go, so you already know quite a bit about the answer. To complete your answer, use a CURRENT Law Book and find the article number pertaining to that specific situation. Write that article number in the blank area. Now, when you give an answer about the necessity of a committee or a secret ballot, you have the article number so that you can readily look into it further, if necessary.

Take a look at your new MONITOR OF THE LODGE. Check **pages 91-103**. It will show you the words and procedures to use in balloting actions. It might help to memorize them, but this is not necessary. They can be read, but in any case, these procedures should be used.

Your Lodge Counselor has a completed Balloting Guide, and if you have difficulty in locating the article number or locating a current Grand Lodge Law Book, he can help you in making sure your balloting guide is complete and correct.

The index in the back of the Law Book is probably the easiest way to locate these article numbers. Most will be found under the heading "*Petitions for:*". When you find the article, read it thoroughly and be sure you understand it. If it doesn't seem to agree with the words on your chart, look again to be sure.

As a final point of help, your Lodge Counselor will be glad to help you with any problems you may encounter.

The exercise chart is attached for easy removal and use with other documents.

Counselor's Initials _____

TYPES OF PETITIONS AND VOTES	Voting Methods												
	In Writing	Secret Ballot	Hand Vote	Layover (28 Days)	Requires Committee	Unanimous Vote	Black Balls to reject (4 or more)	Two/Thirds Majority	Majority	Black Balls to reject (3 or more)	Vote by all Texas Masons	Vote by this lodge only	Protest Allowed
For Degrees													
For Affiliation		OR	(2)	(2)									
For Advancement													
For Reinstatement (After one year)													
For Dinit		OR			(1)								
For Plural Member		OR	(2)	(2)									
For Waiver of Jurisdiction		OR											
For Reinstatement (More than 3 years)													
Expulsion for Suspended (3 years)													
Certificate of Good Standing		OR			(1)								

(1) If not unanimous then automatically granted, if no charges preferred by next stated meeting.

(2) If verbally requested by any member.

PREPARING TO BE MASTER - EXERCISE NO. 5

* * FINANCES AND BUDGET * *

As a newly-raised Master Mason, I wondered just how much money was involved when a brother would make a motion to spend the "usual amount". It was not until I had been in the lodge a few years that I had the courage to stand up and ask how much the "usual amount" was and whether we could afford it. It's kind of like the first audit report I ever heard. The Senior Warden, our chairman of the Audit Committee, gave his report: "We received last year \$9,637.37, and we spent \$10,496.61. We have looked at the books, and they look good." That was the end of the report. This scared me half to death. We had spent more than we had taken in, but the older brethren in the lodge did not question it. So I sat back, assuming that we had some plan to make up the difference.

The year that I was Senior Warden and Chairman of the Audit Committee, my annual report caused many eye brows to raise in question. After the meeting, I was approached with the question: "Was all that necessary?" I told all who would listen about the requirements in Grand Lodge law, which require an annual audit using the Grand Lodge form or the format established by the form. I told them that the budget was my idea.

I admitted that the figures I had quoted for our projected income and disbursements for the next year were not required, but, at least, it would allow the brethren to have some kind of measuring stick for determining if we were going to be able to pay our bills next year. I had come to the conclusion that it was the right and responsibility of every brother in the lodge to know whether we had enough money to make it next year. I was under the impression, as a young Mason, that a lodge could set dues and degree fees to meet their own needs. Later, I was to learn that the Grand Lodge had established minimums, and although most lodges could not afford to have their dues this low, they are established in the law.

We had a visitor the next year when the projected budget was read, and he asked me about it after the meeting. I told him that it was just a tool to help us keep everyone informed about where we stood financially. I explained that some lodges made the budget a very formal thing where they discussed and voted on the funds allocated. They would keep a close accounting of funds to assure that no more was spent than budgeted. Other lodges, like ours, just used it as a guide to see if these projections of income and disbursements were about right. We usually have a report on how well we are doing half-way through the year. One thing the budget has done for us is that it has made all the brethren aware of how we stand financially and, when we were forced to raise our dues, everyone knew the reason why. Another good thing happened because of it: The brethren now want a Treasurer's Report before we vote on "money matters" so that they can make an informed decision. Many people do not like to talk of finances, but one of the truths we must learn is that "*funding is a necessity of Lodge Operation.*"

*** * LEARNING ACTIVITY * ***

Grand Lodge law has an article (**a law**) and a form for audits. The first activity is to list the number of the article and the form number.

Article Number _____

Form Number _____

Counselor's Initials _____

* * *

Grand Lodge also has an article on minimum dues which lodges **must** charge. The second activity is to list the number of that article.

Article Number _____

Counselor's Initials _____

* * *

The third activity is to discuss with the Lodge Counselor how your lodge handles its expenses and the benefits that might accrue to the lodge should your lodge adopt the policy of operating with a budget. A sample budget is attached.

Counselor's Initials _____

Lodge Budget Worksheet

Income		Expenses	
Annual Dues	_____	Grand Lodge Per Capita	_____
Petition Fees	_____	George Washington	_____
Interest on Investments	_____	National Memorial	_____
Dividends on Investments	_____	Building Repairs (or	_____
Rents from Commercial	_____	Reserve Acct.)	_____
Property	_____	New Furniture	_____
Maintenance Reimburse-	_____	Furniture Repair	_____
ment Other Bodies	_____	Equipment & Appliances	_____
Meals & Refreshments	_____	Repair	_____
Fund Raising Meals	_____	New Equipment &	_____
General Contributions &	_____	Appliances	_____
Gifts	_____	Depreciation	_____
Special Purpose	_____	Utilities	_____
Contributions	_____	Rent or Occupancy Charge	_____
Tax Exempt Contributions	_____	Mortgage	_____
(Scholarship & Charity)	_____	Meals & Refreshments	_____
Interest on Tax Exempt	_____	Fund Raising Meals	_____
Contributions	_____	Cost of Goods for Sale	_____
Other Social	_____	Other Social Activities	_____
Reimbursements	_____	Interest	_____
Memorials	_____	Insurance	_____
Sale of Goods	_____	Officer Salaries	_____
Other Fund Raising	_____	Other Salaries	_____
Activities	_____	Social Security	_____
Other Income	_____	Unemployment Tax	_____
TOTAL	_____	Property Tax	_____
		Sales Tax	_____
		Income Tax	_____
		Postage	_____
		Printing	_____
		Office Supplies	_____
		Scholarships	_____
		Charities	_____
		City Assessments	_____
		Snow Removal & Lawn	_____
		Mowing	_____
		Other Expenses	_____
		Miscellaneous	_____
		Special Projects	_____
		TOTAL	_____
		NET GAIN (LOSS)	_____

PREPARING TO BE MASTER - EXERCISE NO. 6

* * LAW AND TRADITION * *

A newly-raised Master Mason approached me in the lodge one evening, concerned that he might, as he put it, be kicked out of Masonry. He went on to explain that he had visited another lodge and had been very concerned when the lodge did not pledge allegiance to the flag after the lodge was opened. He had been told that it was Grand Lodge Law that the **Pledge of Allegiance** must be said at the opening of the lodge. The problem arose when he turned to a brother to ask about it, and their discussion got a little loud. The Master asked the two brothers what the discussion was about and when told what our young brother had said, the meeting was stopped for research of Grand Lodge Law. When nothing could be found in the law, the meeting was continued. I first informed our young brother that he would not be put out of Masonry but that he should know the Grand Lodge Law so that he could stay out of these kinds of situations. I told him that from a lodge operation standpoint, tradition could be as strong as law, but that the Grand Lodge could not enforce or take adverse action based on tradition. I got my law book and showed him that the book was laid out with a table of contents and an index. I used the example of how to find out which degree should be open when conducting a funeral. We first looked in the index under "**Funerals**" (**page 329**) then under "**Lodge opened in Third Degree**", which told us **Article 361** covered it. I think he started having fun with it, because he said, "OK, what about the dues of our lodge? I don't see them in the Grand Lodge Law Book? All it states is the minimum dues." I then showed him how the Grand Lodge Law allowed subordinate lodges to have by-laws. These by-laws must be approved by Grand Lodge and when so approved, become the Laws of an individual lodge. He asked how he would know about those laws? I told him that the Secretary would have a copy he would give him. In fact, I told him that a lot of lodges give a copy of their by-laws to a brother on the night he is raised, and that I thought that this was one of the good traditions.

He seemed to be satisfied with how to find laws but he asked what would he do if he did not understand a law or how it applied? I told him to discuss it with other well-informed brethren, and if he was still not sure, to ask the Master. I told him if the Master did not know he would ask the District Deputy Grand Master, and if he did not know he would ask the Grand Master for a decision.

*** * LEARNING ACTIVITY * ***

Let's have some fun. Let us see if you can tell if the following are laws or traditions.

Not walking between the East and the Altar.

Law _____ Tradition _____

Wearing the hat in the East while presiding over the lodge.

Law _____ Tradition _____

When addressing the lodge, standing and saying, "Worshipful Master, Wardens and Brethren."

Law _____ Tradition _____

Your first activity is to discuss your answers with your Lodge Counselor.

Counselor's Initials _____

* * *

Researching the Grand Lodge Law can be a real experience. Using the index and the table of contents is your best approach. The second activity is to determine the article and page number of the following:

When can a protest be withdrawn?

Article Number _____ Page Number _____

To how many lodges may a Texas Mason belong?

Article Number _____ Page Number _____

Who may be elected as Junior Warden?

Article Number _____ Page Number _____

At what time must a Stated Meeting be opened?

Article Number _____ Page Number _____

Counselor's Initials _____

* * *

Laws tie our lodges together in unity, but our traditions give our lodges personality. The third activity is to discuss with your Lodge Counselor some of the traditions of your lodge and a neighboring lodge.

Counselor's Initials _____

PREPARING TO BE MASTER - EXERCISE NO. 7

* * BY-LAWS * *

Webster's Dictionary defines **by-laws** as "*Secondary laws or rules*". Thus, by-laws are basically rules, secondary to Grand Lodge Laws, that apply to one lodge, but not necessarily to all lodges.

Laws, no matter whether they are Grand Lodge Laws or lodge by-laws, are mandatory. The Worshipful Master can change the way things are done for the year he is Master, provided he does not violate either the Grand Lodge Laws or the lodge's by-laws, but the next Worshipful Master can change it again the following year if he wants. The only way to make something permanent is to put it into the by-laws.

The major point to remember when reviewing by-laws is that they must not conflict with Grand Lodge Laws. They should also be concise, to the point, clearly understood and only what is absolutely necessary. The key here is don't overdo it.

The by-laws should take into consideration conditions of both the present and the future. They should not tie the lodge to doing something in the future when the financial condition of the lodge or costs might be unknown. For example, it may be unwise to have a by-law requiring the lodge to purchase 10 new books each year for its library. Today, the books may cost \$10-\$15 each, however, in 5 to 10 years they may cost \$40-\$80 each. Inflation might drain the lodge of reserve funds and this could be a luxury the lodge would not be able to afford. Again, keep it simple and look for the unexpected in the future.

Take a look at the by-laws of your lodge. Are they current? Do they correctly reflect the stated meeting days, meeting times, degree fees and dues?

If they need updating or changing, how do you change them? Some changes require their submission to Grand Lodge for approval, and other changes only require notification to the Grand Secretary.

Who keeps the current by-laws in the lodge? How are changes in the by-laws recorded?

By reviewing the Grand Lodge Law Book concerning by-laws, you can answer these questions and learn more about this subject.

* * **LEARNING ACTIVITY** * *

Since by-laws are laws, maybe we should start with a look at what Grand Lodge Law has to say about them. The first activity is to list the article numbers that govern the following:

A. Conflict with Grand Lodge Law.

Article Number _____

B. When by-laws may be adopted?

Article Number _____

C. What must be forwarded to Grand Lodge to obtain approval of by-laws?

Article Number _____

Counselor's Initials _____

* * *

What must be approved? A good question. The second activity is to list two **(2)** types of by-laws changes that do not require Grand Lodge approval.

1.

2.

Counselor's Initials _____

* * *

Now we need to look at our own by-laws. Do they meet Grand Lodge requirements? Do they reflect everything we need as our lodge law? The third activity is to review your by-laws, and discuss their condition with your Lodge Counselor.

Counselor's Initials _____

PREPARING TO BE MASTER - EXERCISE NO. 8

*** * INVESTIGATING COMMITTEES * ***

You are presiding in the East at a stated meeting. The Secretary finishes reading a petition for the degrees and says, "The petition also contains the names, addresses and phone numbers of five character references, all of which appear to be in order, although four of the five are out of state."

Brother Tom rises with a question, "Don't the references have to reside within the jurisdiction of the Grand Lodge of Texas?" Your answer is that the law allows references to reside outside the state boundaries. You then appoint Brothers Bill, Jim and John to the investigating committee.

Brother Bill rises and says that he has never been on an investigating committee before and that he has no idea of what is expected. Brother John rises and says he is too busy to visit the petitioner, but if a phone call will do it, he will be glad to serve.

Sometimes events occur in rapid fire succession as these did. You, as Master, must be prepared to handle such a situation. To prepare for those contingencies, you must first be familiar with the law.

Next, you must understand the importance of the formation of the committee itself. The **who** and the **when** are the key elements. The **when** part is easy. You don't want to wait until the last minute. The selection should be made prior to the meeting at which the petition will be read so that you will have ample time to make your selection. The **who** part is much more difficult, and because of the serious nature of the committee, it requires that considerable thought be given to who should make up the committee. You must never lose sight of the very important responsibility of the committee. It is the eyes and ears of the lodge. Don't be drawn off into some old beliefs, such as, "It is a good tool to get brothers who have not attended lodge in a long time, back in the lodge." Another common error is to go down the lodge roster to pick the next three brothers. How could brothers who never attend lodge know the importance of the task or how to conduct an investigation? In order to fulfill this very responsible task, it is most important that the Master, Secretary and members of the committee all do their parts with dedication.

*** * LEARNING ACTIVITY * ***

One of the things we mentioned earlier was that you should be familiar with the Grand Lodge Law. The first activity is to fill in the article number for the following. Answers can be found in **Title IV, Chapter 1**, entitled "Candidates".

A. Can a character reference on a petition reside outside the jurisdiction of the Grand Lodge of Texas?

Article Number _____

B. When is an investigation committee appointed?

Article Number _____

C. Who appoints the committee?

Article Number _____

D. How many compose a committee?

Article Number _____

E. How long does a committee last?

Article Number _____

F. What are the provisions for changing committee duration and/or composition?

Article Number _____

G. Under what conditions may a Master of the lodge serve on an investigating committee?

Article Number _____

H. What information is the committee required by law to obtain concerning the petitioner?

Article Number _____

I. Can a recommender or reference serve on an investigating committee?

Article Number _____

Counselor's Initials _____

* * *

Some actions require us to use logic and experience to complete. The second activity is to answer the following questions. For these questions there are no specific right or wrong answers in most cases. The best source of information for these answers is from other informed brethren and your own study and thoughts.

A. What is the significance of character references on a petition, and how much effort should be exerted to obtain information from them, if any? Should you attempt to contact out of city references and if so, how might you go about it?

B. How far should you go in your investigation? Is there any importance in obtaining information other than that required by law?

C. How do you view the inclusion of the petitioner's family in your investigation?

D. Where do you think would be an appropriate location for your interview with the petitioner or is an interview necessary?

Counselor's Initials _____

* * *

Picking the right people for an investigating committee takes some thought. The third activity is an exercise in helping to make these selections. Make a list of committee members you would select and check why you selected them. Review list with Lodge Counselor.

Counselor's Initials _____

EXERCISE RECORD

Exercise No. 1 - DUTIES AND RESPONSIBILITIES

First Activity Completion Date _____
Second Activity Completion Date _____

Exercise No. 2 - COMMITTEES

First Activity Completion Date _____
Second Activity Completion Date _____
Third Activity Completion Date _____

Exercise No. 3 - PLANNING ACTIVITIES

Activity Completion Date _____

Exercise No. 4 - BALLOTING GUIDE

Activity Completion Date _____

Exercise No. 5 - FINANCES AND BUDGET

First Activity Completion Date _____
Second Activity Completion Date _____
Third Activity Completion Date _____

Exercise No. 6 - LAW AND TRADITION

First Activity Completion Date _____
Second Activity Completion Date _____
Third Activity Completion Date _____

Exercise No. 7 - BY-LAWS

First Activity Completion Date _____
Second Activity Completion Date _____
Third Activity Completion Date _____

Exercise No. 8 - INVESTIGATING COMMITTEES

First Activity Completion Date _____
Second Activity Completion Date _____
Third Activity Completion Date _____

LODGE COUNSELOR AFTER ISSUING POCKET CARDS MAIL COMPLETED FORM TO:
THE GRAND LODGE OF TEXAS, P.O. BOX 446, WACO, TEXAS 76703
COMMITTEE ON MASONIC EDUCATION AND SERVICE

(CUT ON LINE AND RETURN IN ENVELOPE)
GRAND LODGE OF TEXAS COMMITTEE ON MASONIC EDUCATION AND SERVICE

(FIRST NAME) (MI) (LAST NAME) (TITLE, IF OFFICER) (ID NUMBER)

of _____ Lodge, No. _____, District No. _____

has completed the following manual (s)

- Preparing to be Master _____, 20 ____
(MONTH) (DAY)
- Preparing to be Senior Warden _____, 20 ____
(MONTH) (DAY)
- Preparing to be Junior Warden _____, 20 ____
(MONTH) (DAY)

Counselors' Lodge mailing address: _____,
_____, Texas _____
(CITY) (ZIP CODE)

LODGE COUNSELOR

(CUT ON LINE AND RETURN IN ENVELOPE)
GRAND LODGE OF TEXAS COMMITTEE ON MASONIC EDUCATION AND SERVICE

(FIRST NAME) (MI) (LAST NAME) (TITLE, IF OFFICER) (ID NUMBER)

of _____ Lodge, No. _____, District No. _____

- Preparing to be Master _____, 20 ____
(MONTH) (DAY)
- Preparing to be Senior Warden _____, 20 ____
(MONTH) (DAY)
- Preparing to be Junior Warden _____, 20 ____
(MONTH) (DAY)

Counselors' Lodge mailing address: _____,
_____, Texas _____
(CITY) (ZIP CODE)

LODGE COUNSELOR

(CUT ON LINE AND RETURN IN ENVELOPE)
GRAND LODGE OF TEXAS COMMITTEE ON MASONIC EDUCATION AND SERVICE

(FIRST NAME) (MI) (LAST NAME) (TITLE, IF OFFICER) (ID NUMBER)

of _____ Lodge, No. _____, District No. _____

- Preparing to be Master _____, 20 ____
(MONTH) (DAY)
- Preparing to be Senior Warden _____, 20 ____
(MONTH) (DAY)
- Preparing to be Junior Warden _____, 20 ____
(MONTH) (DAY)

Counselors' Lodge mailing address: _____,
_____, Texas _____
(CITY) (ZIP CODE)

LODGE COUNSELOR

GRAND LODGE OF TEXAS COMMITTEE ON MARKS, EDUCATION AND SERVICE

Item No.	Description	Amount
1	Preparing to be Junior Warden	20
2	Preparing to be Senior Warden	20
3	Preparing to be Master	20
Council's Lodge meeting		
Total		
Grand Total		

