

LODGE SECRETARY'S CHECKLISTS

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This information is in no way official, nor is it approved by the Grand Lodge of Alabama. It is hopeful that it may be of some use to Secretaries of Subordinate Lodges as they perform the varied duties for which they are responsible.

For an authoritative answer to all questions concerning the Secretary's duties, contact the Grand Secretary, 3033 Vaughan Road, Montgomery, AL 36106. (Please do not use the old P. O. Box number.)

Edict numbers and references to the Constitution are made from the Masonic Code of Alabama in 2001. These are subject to change.

If you find any error in this, please communicate with the compiler. Likewise, suggestions for improvement by addition or simplification will be appreciated.

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DUTIES OF THE SECRETARY

The Installation of Officers points out basically the duties of the Secretary but many other responsibilities are added in the Masonic Code of Alabama in the Constitution and Edicts.

He is the recording officer of the Lodge and as such it is his duty to keep accurate and sufficiently detailed records of the proceedings of the Lodge. What may seem trivial today, may be of great significance at a future date. Reference should be made in the minutes to anything concerning status of membership. Inclusion of reference to a transfer, death, affiliation, suspension, or conferring of a degree can be an important source of information for researchers in the future.

The Secretary is the corresponding officer of the Lodge and therefore receives and reads all communications addressed to the Lodge or to him as Secretary. He writes the replies as directed by the Lodge or the Worshipful Master or the policies of the Lodge. He issues statements, notices, summonses, demits, certificates, etc. when authorized to do so. He corresponds with members of the Lodge, the Grand Secretary, and other Lodges in Alabama. He directs all correspondence to Lodges of other grand jurisdictions to the Grand Secretary of the Grand Lodge of Alabama, who in turn forwards them through the proper channels. He makes reports to the Grand Secretary quarterly as required by the Grand Lodge. He has a vote when present in Grand Lodge.

The duty of collecting all money for the Lodge falls on the Secretary. He must keep a detailed record of money received and the source and the purpose of each collection. That money is all turned over to the Treasurer, either in person or deposited to the Lodge's bank account from which the Treasurer writes checks. He issues dues cards to members when dues are received.

In practice, the Secretary is often a continuing officer, that is he serves year after year while the other officers, including the Worshipful Master, usually serve only one year. He accumulates experience which is valuable to the Lodge and to the Worshipful Master and therefore becomes very important in being able to guide and advise the Master and the Lodge.

The small amount paid most Secretaries helps defray costs he incurs but is not something that would attract a person to accept the responsibility of performing the duties which are expected to be performed by him.

In addition to defined duties, a summary of commendable characteristics which every Secretary should develop and adopt as his own, might read as follows:

1. Be at Lodge early for every meeting.
2. Be inherently and unimpeachably honest.
3. Exemplify Courtesy.
4. File records carefully and efficiently and keep them in a safe place.
5. Read and speak in a clear and audible voice.
6. Record or file historically interesting or important items.
7. Strive for clear, complete, accurate and up-to-date records.
8. Write plainly and legibly, using a typewriter whenever possible.
9. Remember that the Worshipful Master is the head of the Lodge.
10. Cooperate with the Grand Secretary by answering correspondence promptly.
11. Make all required reports correctly and timely.

PETITION FOR ADVANCEMENT

When a petitioner is elected or a candidate receives the Entered Apprentice degree or the Fellowcraft degree and fails to advance for a period of one year, he is required to file a petition for advancement before receiving another degree. He is still permitted to sit in a Lodge of the degree he has attained and to study the lesson he is required to learn and be examined on it in open Lodge whether his petition for advancement has been approved or not.

GRAND LODGE REGULATIONS:

1. One ballot elects a petitioner for all three degrees, but he is only allowed one year to progress from the status of uninitiated to Entered Apprentice, Entered Apprentice to Fellowcraft, and Fellowcraft to Master Mason. If that time passes without advancement, it is necessary for the Worshipful Master to appoint an investigating committee and that committee make a favorable report, and a majority of the members present approve that favorable report before he can be advanced. [See Edict 6.13]

WHEN THE SECRETARY RECEIVES A PETITION FOR ADVANCEMENT HE SHOULD:

1. Inform the Worshipful Master so he can appoint a committee as required.
2. Send notices to the committee members.

PETITION FOR AFFILIATION

A Petition for Affiliation is the form used by a Mason who has a Demit from a Lodge under the jurisdiction of this Grand Lodge or a Lodge chartered by a Grand Lodge with which the Grand Lodge of Alabama maintains fraternal relations when he desires to become a member of a Lodge in Alabama.

GRAND LODGE REGULATIONS:

1. There are no residence requirements for one petitioning for affiliation. He may live anywhere and have a demit from anywhere. [See Edict 17.15]

2. Each Petition for Affiliation must be accompanied with a Demit or a legal certificate in the nature of a Demit from a recognized Lodge and the Petitioner's signature must be on the Demit. [See Edict 17.11]

3. A Petition for Affiliation can be received only at a Regular Communication and the investigating committee must report at a subsequent Regular Communication. [See Edict 17.13]

4. A petition for affiliation must take the same course as for initiation even though it be the Lodge which granted the demit. [See Edict 17.14]

5. A Demit is not affected by age. [See Edict 17.15]

UPON RECEIVING A PETITION FOR AFFILIATION THE SECRETARY SHOULD:

1. Examine it carefully to see that all blanks have been filled in and that the signatures of the Petitioner, Recommender and Avoucher are in order.

2. Verify that the Recommender and Avoucher are both members in good standing of that Lodge. [See Article VI, Section 8]

3. Verify and note on the Petition the amount of the fee accompanying it, if any is required by the Lodge.
4. Verify the Demit is signed by the Petitioner and that it is from a recognized Lodge. A copy of the book "List of Lodges" should be in the possessions of the Lodge.
5. Prepare to present the Petition to the Lodge at the next Regular Communication at which time the Worshipful Master should appoint a committee of three Master Masons from the Lodge to investigate the petitioner.
6. After the Worshipful Master appoints the committee, send notices of the appointment along with necessary information about the Petitioner to each member of the committee.
7. When the committee report is ready, be prepared to call it to the attention of the Worshipful Master so a ballot may be taken.
8. Calculate what dues are due for the remainder of the year and prepare a dues card for the new member if he is elected.

ANNUAL COMMUNICATION OF THE LODGE

1. The Annual Communication of the Lodge must be held on the last Regular meeting before (but not on) June 24th each year. Certain pieces of business must be transacted at that meeting:
2. Reading of the minutes of the last communication and other routine business such as approving payment of bills against the Lodge, presenting petitions, committee reports, balloting, etc.
3. It is informative for the Secretary to have a Statistical Report summarizing the membership status by showing the number of each degree conferred, affiliations, transfers, deaths, etc.
4. If there are any amendments to the Grand Lodge Constitution to be voted on, the Secretary should have a copy of them and be ready to get an exact count of the vote because the report calls for the number voting each way on the amendments.
5. The Secretary should have prepared the names of those members who are in arrears in the payment of dues and about to be suspended.
6. The election of officers takes place at this meeting, so an alert Secretary will have slips of paper for casting ballots.
7. The Secretary should be ready to send the names and addresses of the newly elected Worshipful Master and Secretary to the Grand Secretary immediately and not wait for installation.
8. The Secretary should make a list of the officers to be installed for use by the Installing Officer. After installation they should be reported to the Grand Secretary.

ANNUAL REPORT TO GRAND SECRETARY

Records of membership should be on file with the Grand Secretary and for that purpose every Secretary of a subordinate Lodge is required to make an Annual Report of the standing as of July 14th each year.

GRAND LODGE REQUIREMENTS:

1. Every Lodge shall, on the fourteenth day of July; make to the Grand Secretary a report in writing showing who are its officers and members, the dates of admission to membership, initiations, passings and raisings, the names of those persons rejected, suspended, expelled, reinstated, withdrawn and dead, with the dates annexed, since the last return and pay the required Grand Lodge dues and Entered Apprentice fees. [See Article VI, Section 21]

2. The Annual Report shall be forwarded to the office of the Grand Secretary on or before the fourteenth day of August. [See Edict 8.12]

WHAT THE SECRETARY SHOULD DO:

1. Fill in all the blanks on the form furnished by the Grand Secretary.
2. Tabulate the membership, starting with the final total on the last quarterly report.
3. Calculate the amount of dues and fees owed.
4. Sign and seal the report.
5. Mail the report with the proper remittance to the Grand Secretary.

MEMBER'S DEATH

All Masons (EA, FC & MM) in good standing at their death are entitled to a Masonic funeral service if requested by his surviving family. [Edict restricting Masonic Burial to MM only deleted in 1998]

Upon the death of any Master Mason in good standing, the Lodge of his membership should furnish his widow with a certificate, under the seal of the Lodge, showing his membership, standing and death, without any application or charge therefor. [See Edict 8.15]

WHEN A MEMBER DIES THE SECRETARY SHOULD:

1. Contact the Worshipful Master, or if he cannot be reached the Senior or Junior Warden so they can contact the family. Search the member's record to see if he has requested a funeral service to be conducted by the Lodge, Scottish Rite, Knights Templar, or any special requests such as a gift to the Alabama Masonic Home in lieu of flowers. If the family desires a Masonic funeral, the Lodge officers will need time to make the arrangements.
2. While it is not specified as his duty, the Secretary usually arranges to have flowers sent. Some lodges make a contribution to the Alabama Masonic Home Endowment Fund in lieu of flowers and a card of thanks is sent to the family by the Grand Lodge.
3. Prepare a Widow's Certificate (there is also a wallet card which goes with it) by filling in all the information and have the proper officers sign it, then place the seal of the Lodge on it and give it to the Worshipful Master to arrange for its delivery.
4. Since a Master Mason Lodge must be opened for a Masonic funeral, the Secretary must keep minutes of that meeting.
5. Update member's record, remove his name from the active file and mailing list.

DEMIT

A Demit is issued when a member wishes to withdraw from the Lodge where he is a member. It is issued only to Master Masons in good standing who do not owe the Lodge anything, whose dues are paid up, and have no Masonic charges pending against them. A member may desire to demit for personal reasons, because they are moving or have moved and want to deposit it in another Lodge, or to establish a new Lodge. The reason is immaterial. It is his right.

Membership may be transferred instead of receiving a demit and affiliating with another Lodge. See comments under "Transfer Petition/Certificate."

GRAND LODGE REGULATIONS:

1. The request for a demit may be made orally in open Lodge or in writing at a regular communication. [See Edict 17.1]
2. When the request is made, the Secretary should state whether the applicant has complied with the requirements, and if he has and no member prefers charges against him, the demit is granted without vote of the Lodge. This severs the membership of the brother instantly. [See Edict 17.2]
3. Dues cannot be collected beyond the date of request for demit. [See Edict 18.6]
4. A demit cannot be granted to a duly installed Master or Warden or if by so doing the membership of the Lodge would be reduced below the required constitutional number. [See Edicts 17.1, 17.3 and Article I, Section 7]

WHEN THE SECRETARY RECEIVES A REQUEST FOR A DEMIT HE SHOULD:

1. Present it to the Worshipful Master for action.
2. When approved, fill out the form completely, place the seal of the Lodge on it and forward it to the Grand Secretary for endorsement.
3. When returned by the Grand Secretary, send to the withdrawing member.
4. Refund dues paid for the remainder of dues year.

DISMISSAL CERTIFICATE

A Dismissal Certificate is similar to a Demit except it is issued to an Entered Apprentice or a Fellowcraft, where a Demit is issued to a Master Mason. It severs all relationship between the Entered Apprentice or Fellowcraft and the Lodge.

GRAND LODGE REGULATIONS:

1. An E. A. or F. C. is entitled to a Dismissal Certificate when he has removed from the territorial jurisdiction of the Lodge if he has not been stopped for advancement by objection. [See Edict 6.6]
2. A dismissal certificate or transfer cannot be granted while an objection is in force. [See Edict 6.6]

A SECRETARY RECEIVING A REQUEST FOR A DISMISSAL CERTIFICATE SHOULD:

1. Present it to the Worshipful Master for action.
2. When approved, fill out the form completely, place the seal of the Lodge on it and forward it to the Grand Secretary for endorsement.
3. When returned by the Grand Secretary, send to the withdrawing member.

DUAL MEMBERSHIP

Dual membership refers to a Mason who holds membership in two different Lodges, either in Alabama or one in Alabama and one in another Grand Jurisdiction.

GRAND LODGE REGULATIONS

17-20. DUAL MEMBERSHIP—A Master Mason can be a member of two Masonic Lodges in this Grand Jurisdiction, provided both Lodges record him as a dual member, and his membership is reported to the Grand Lodge. However, a dual member cannot hold elected office, in both lodges at the same time. Furthermore a Master Mason of a Lodge in this Grand Jurisdiction may also hold membership in another Grand Jurisdiction provided this Grand Jurisdiction is in fraternal relations with the other Grand Jurisdiction and that said Grand Jurisdiction legalizes dual membership.[ammended 1998]

Should a Master Mason holding dual membership within Alabama desire to withdraw his membership from one Lodge, he shall notify the Lodge from which he desires to withdraw his membership of his decision, and if he has paid current dues and no charges are pending against him, the Secretary of that Lodge will carry him as withdrawn and notify the other Lodge in which dual membership was held of the date that the member is no longer a dual member. Should a Master Mason holding dual membership in Alabama and another Grand Jurisdiction desire to withdraw his dual membership from the Lodge in Alabama, he will notify the Lodge from which he desires to withdraw his membership of his decision, and if he has paid current dues and no charges are pending against him, the Secretary of that Lodge will issue a demit marked “DEMIT FROM DUAL MEMBERSHIP” and send the demit to the Grand Secretary for his endorsement, who will then forward the demit to the Grand Lodge of the other jurisdiction to be forwarded to the other Lodge in which dual membership was held. In no case shall the Secretary issue a demit to a member who holds membership in another Lodge. Any matter that affects membership in either Lodge will likewise affect membership in both. [ammended 1996]

17.13. WHEN RECEIVED — A petition for affiliation or dual membership can be received at a regular communication only, and the report of the committee on such petition must be made in a subsequent regular communication. [amended 2001]

SECRETARY'S DUTIES

1. Examine the Petition for Dual Membership carefully to see that all blanks of the top section have been filled in and that the full name of the Petitioner is signed.

2. Prepare to present the Petition to the Lodge at the next Regular Communication at which time the Worshipful Master should appoint a committee of three Master Masons from the Lodge to investigate the petitioner.

3. After the Worshipful Master appoints the committee, send notices of the appointment along with necessary information about the Petitioner to each member of the committee.

4. When the committee report is ready, be prepared to call it to the attention of the Worshipful Master so a ballot may be taken.

5. After a favorable, unanimous ballot, fill in the center portion of the form (Notice to Secretary of Responding Lodge of Application for Dual Membership in an Alabama Lodge), place the Lodge seal on it and mail both the original and duplicate to the Lodge of his basic membership. If the Lodge is in another jurisdiction, mail it to the Grand Secretary who will in turn forward it to the member's Grand Secretary and he to the subordinate Lodge where the Petitioner holds his basic membership.

6. The Secretary of the Lodge receiving the form will complete the bottom portion of the form (Certificate of Good Standing) and imprint the seal of the Lodge. He will retain the duplicate and return the original of the form to the Lodge (through the Grand Secretaries if in different Grand jurisdictions) electing the member to Dual membership. The effective date of the Dual Membership is the date the Certificate of Good Standing bears as that is the final action required to complete the transaction.

7. If both Lodges are under the Grand Lodge of Alabama, both Secretaries will show the Brother as a dual member on their reports to the Grand Secretary.

8. If a dual member desires to discontinue membership in either Lodge, he should notify the Lodge from which he desires to withdraw his dual membership. The Secretary of that lodge will show that he is no longer a member and report that to the Grand Secretary and the other Lodge. If the other Lodge is not under the Grand jurisdiction of Alabama the notification is made through the Grand Secretary's office.

9. Demits from Dual Membership are not necessary when both Lodges are in Alabama. If the basic membership is in another jurisdiction, the Demit should never be given the member in person, but rather sent to the other Lodge to show that he is no longer a dual member.

10. Notify the other Lodge of anything which affects his membership in your Lodge because it will likewise affect his membership both Lodges.

NOTE:

1. While a Mason can hold membership in two Lodges in Alabama at the same time, he is not allowed to hold elective office in both Lodges at the same time. [Edict 17.20]

2. Anything which affects his membership in one Lodge likewise affects his membership in both Lodges. For instance, if one Lodge suspends him for any reason (unmasonic conduct or non-payment of dues) he is suspended in the other Lodge, also.

MEMBER'S DUES

Dues are an annual amount each member is required to pay for the support and operation of the Lodge.

GRAND LODGE REGULATIONS:

1. The Lodge has the right to assess and collect such dues as it may find reasonable and proper. [See Article VI, Section 1]

2. A portion of the dues is to be remitted to the Grand Lodge for operation of the Grand Lodge and the Alabama Masonic Home (sometimes referred to as per capita tax).

3. Any member whose dues remain unpaid for two years or for one year if the bylaws of the Lodge so provide must be suspended from membership at the Annual Communication of the Lodge, effective as of midnight June 23. If the member cannot pay his dues and the Lodge feels it should be done, the Lodge may remit (excuse the payment) his dues. This avoids suspension but does not relieve the Lodge from paying the Grand Lodge Dues for the member. [See Edicts 18.7–18.11 and 18.21]

4. There is a provision made whereby a member may purchase a Perpetual Dues Membership. The cost is fifteen times the annual dues of the Lodge or a minimum of \$350.00. [See Edict 18.4]

THE SECRETARY SHOULD:

1. Prepare a supply of dues cards either from Grand Lodge supplies or a private printer. The cards must have the Grand Lodge endorsement and seal printed on the reverse side.

2. The dues card should identify the member, the Lodge, Lodge location, date issued, date to which dues are paid, and a place for the Secretary of the Lodge and the member to sign. The seal of the Lodge must be impressed in the card to make it legal information. It is also a good idea to include an address or phone number so the lodge may be located by a person who needs to reach the lodge in case of an illness or death.

3. This card may be accepted by the member as a receipt for paying his dues and the Secretary should enter the collection of the dues in his Cash Book and record it on the individual's ledger sheet.

4. It is the duty of the Secretary to forward a notice of all dues and assessments to each member of his Lodge prior to June 24th of each year and in advance as to allow ample time for said member to respond prior to June 24th of each year [Edict 15.9]. This is a good time to request a contribution to the Pennies Program where members are asked to contribute at least a penny a day (\$3.65) to the Masonic Home Endowment Fund.

5. While different Secretaries use different systems which work for them, one good practice is to fill in the name of each member on a card at the beginning of the year. When he pays, date and seal the card. A quick glance at the remaining cards shows which members still owe dues.

6. Grand Lodge assessments, such as the special assessment to support the Masonic Home, are to be handled as prescribed by the Lodge By-Laws. If the By-Laws state that the member will pay a certain amount plus an amount equal to any dues and assessments of the Grand Lodge, then the member **MUST** pay the assessment and can be suspended if he fails to pay. If there is no mention of assessments by the Grand Lodge, he cannot be suspended for not paying the assessment.

FEES FOR THE DEGREES

Fees are the required payments which must be made to receive degrees.

GRAND LODGE REGULATIONS:

1. The fee for the degrees of Masonry shall in no case be less than \$50.00 payable in advance as follows: For the first degree, \$25.00; for the second degree, \$10.00; for the third degree, \$15.00. [See Article VI, Section 14]

2. Of the fee for the first degree, \$10.00 shall inure to the Grand Lodge for use and benefit of the Alabama Masonic Home. [See Article VI, Section 14]

3. Except for the \$10.00 of the fee for the first degree for the benefit of the Alabama Masonic Home, any Lodge may confer any or all the Blue Lodge degrees gratuitously upon any minister of the gospel actively engaged in the work of the ministry. [See Article VI, Section 14]

THE SECRETARY SHOULD:

1. Verify that at least the amount of the fee for the first degree accompanies the petition. [See Edict 16.15]

2. Verify that the fee for the Fellowcraft degree is paid before the Fellowcraft degree is conferred; and that the fee for the Master Mason degree is paid before the Master Mason degree is conferred. [See Edict 16.15]

3. Be sure that the fees are paid by an instrument upon which cash can be immediately obtained. The Lodge cannot take notes in hand or lend money for the fees. [See Article VI, Section 14 and Edict 16.15]

4. Be sure of the amount of the fees, which should be set by the bylaws of the Lodge. The requirements of the Grand Lodge are minimum amounts which a Lodge may charge. [See Article VI, Section 14]

5. Record the collection of fees in the Secretary's Cash Book and on the individual member's ledger sheet.

6. Remember to include \$10.00 of the E.A. fee to the Grand Secretary on the Quarterly Report for each candidate receiving the Entered Apprentice degree during that period.

GRAND LODGE ANNUAL COMMUNICATION

1. The Annual Communication of the Grand Lodge is held on Tuesday after the third Monday in November at 9:00 A.M. in Montgomery, Alabama.

2. The Worshipful Master, Senior Warden, and Junior Warden are entitled to a vote or may assign a member of the Lodge as a proxy to vote for them. The Secretary is entitled to a vote if present. The Credential forms are sent to the Secretary and he should fill them out and place the seal of the Lodge on them.

LEDGER SHEET AND FILE FOR INDIVIDUAL MEMBER

The work of a Secretary is in a great part that of a bookkeeper. He must keep accurate records of all proceeds and credit each member with paying his dues when paid. For this purpose he should keep an individual ledger sheet for each member. This ledger sheet contains much pertinent information about the member. It has columns for debits and credits and should be posted showing the fees and dues owed and the dates and amounts paid.

It is a good practice to make individual file folders for each member where his petition and all other papers pertaining to him can be kept in one place. This file with all his records can easily be transferred to an inactive file when he is no longer an active member.

MATERIALS THE SECRETARY SHOULD KEEP ON HAND

1. A copy of the latest Proceedings and latest Abridged Report of the Grand Lodge must be kept in the Lodge. [See Edict 13.10]
2. A copy of the latest edition of the Constitution, Edicts, Decisions and Resolutions of the Grand Lodge must be kept in the Lodge. [See Edict 13.10]
3. A copy of the By-Laws of the Lodge.
4. An adequate supply of the forms necessary for the work of the Lodge such as:
 - (a) Minute sheets
 - (b) Ledger sheets
 - (c) Petitions for the Mysteries of Masonry
 - (d) Petitions for Dual Membership (in Alabama & out-of-state)
 - (e) Petitions for Affiliation
 - (f) Petitions for Advancement
 - (g) Transfer Petitions
 - (h) Demits
 - (i) Dismissal Certificates
 - (j) Widow's Certificates
 - (k) Committee Notices
 - (l) Letterheads
 - (m) Envelopes
 - (n) Postage stamps
 - (o) Grand Lodge Report Forms
5. A list of all committees.
6. A list of all candidates who are or should be studying lessons.
7. A list of names and addresses of all members in good standing.

MINUTES

GRAND LODGE REQUIREMENTS:

1. The Installing Officer charges the Secretary “It is your duty to observe all the proceedings of the Lodge; make a fair record of all things proper to be written”; among other things.
2. Article VI, Section 24 directs “that the proceedings of the Lodge be neatly and correctly recorded in a substantial book.”
3. Edict 13.32 requires the Secretary to sign the minutes.
4. Edict 13.33 states “The minutes of a meeting are to be read at the succeeding regular communication, at which time they may be amended and adopted.”

SUGGESTIONS:

Minutes are a permanent record of those things which transpire in a Lodge and should be recorded in a manner which can be clearly understood when read by future generations. While there is no prescribed form in which minutes must be recorded, there are several practices in the way minutes are kept which will prove valuable:

1. If you leave about one inch margin on one side of the page, you can make a note there to identify the content of that section. I have seen minutes recorded in one long paragraph with each matter following the last with no space skipped or no indention and no identification. It is hard to locate specific information thus recorded. If each item of business is a separate paragraph with a marginal note of the subject, then the Secretary, or perhaps the Historian, searching the record can quickly and easily locate the desired information.
2. Some Secretaries prefer to make all names in all capitals so they are easy to locate when searching the minutes.
3. Use full names of candidates and members coming into or leaving the membership. I had the experience of trying to figure which Brother Matthews had transferred when there were three on roll. If a candidate recites a lesson and his full name is recorded in that portion

of the minutes, when the vote on proficiency is recorded it is not necessary to use more than his last name unless there are two candidates with the same last name. Just be sure the facts are clearly stated.

4. The same rule should apply when recording committees. If there is only one member with that last name, it would be clearly understood; but if the Lodge has more than one member with that last name, please record the first name also. Then there can be no doubt about which member is being named.

5. File the minutes in a safe place in a permanent book.

6. A single Lodge is closed in "Due and Ancient Form." When two or three Lodges are closed at the same time it is done in "Due Form".

Ceremonial work done while either the Grand Master or a Past Grand Master is presiding, is done in "ample form", if done while the Deputy Grand Master is presiding, it is done in "due form", if done while one of the Grand Wardens is presiding it is done "in form", if done while any other brother especially deputized by the Grand Master it is done "in form". [Edict 22.5]

7. The following shows a sample of how minutes might be kept.

J. H. McCORMICK LODGE No. 874, F.& A.M.
West Mobile Masonic Temple, Mobile, Alabama

At a Regular Communication of the Lodge held at 7:30 P.M. on Thursday, September 26, 1991, the following officers were present:

Bro. J. A. Kennedy, W.M.	Bro. W. E. Sirmon, Historian
Bro. A. Wayne Bailey, S.W.	Bro. R. E. Lindsey, S.D.
Bro. J. Patrick Kennedy, J.W.	Bro. Frank A. Brown, J.D.
Bro. W. J. Sirmon, Treasurer	Bro. H. A. Davis, S.S.
Bro. H. W. Germany, Secretary	Bro. J. R. Burrows, J.S.
Bro. B. K. Baldwin, Chaplain	Bro. J. V. Compton, Jr., Tiler
Bro. A. J. Saad, Marshal	

Open E.A. An Entered Apprentice Lodge was opened in due and ancient form.

E.A. Exam. Bro. JOHN HENRY JONES was examined on the
J.H.Jones Entered Apprentice lesson with Bro. J. B. Jones
conducting the examination.

Open M.M. The Entered Apprentice Lodge was dispensed with and a
Master Mason Lodge was opened in due and ancient form.

Proficiency On motion by Bro. A... B..., seconded by Bro. C... D..., the
Lodge declared Bro. Jones proficient on the E. A. lesson.

Minutes The minutes of September 19, 1991, were read and approved.

Bills The following bills were presented and approved for payment:
West Mobile Masonic Temple for rent, \$250.00
Payment to the Mobile County Masonic Conference, \$20.00
Commercial Printing Co. for office supplies, \$98.50
Secretary for 100 postage stamps, \$29.00

Ballot The investigating committee reported favorably on the
E.F.G. Petition for the Mysteries of Masonry from E... F... G... and
ballot was had. He was duly elected to receive the degrees
in this Lodge.

Work The Worshipful Master announced that the Lodge would
Schedule have Entered Apprentice degree work on October 3rd, and
Fellowcraft degree work on October 10th.

Closing The Entered Apprentice and Master Mason Lodges were closed
in due form.

Refresh. Refreshments were served after the meeting.

Harold W. Germany, Secretary

Approved: _____

PETITION FOR THE MYSTERIES OF MASONRY

A Petition for the Mysteries of Masonry is the application which a non-member files in order to seek membership in the Fraternity through the Lodge petitioned. There are prescribed manners and restrictions on these and it is usually the Secretary who must verify that all is in order.

GRAND LODGE REGULATIONS:

1. Petitioner must have resided in the State of Alabama for the past 6 months. There are exceptions to this requirement and the residency requirement may be waived for others by the Grand Master [See Edict 11.2]

2. A Petitioner may apply to any Lodge in the State [Edict 11.7 was deleted in 1999], but if he resides nearer another Lodge, the Lodge receiving the petition must write to the Lodge nearest his residence, under the seal of the Lodge, and inquire of that Lodge the questions set out in Article VI, Section 13 of the Constitution. This does not delay the appointing of an investigating committee but the Lodge receiving the petition shall not ballot on the petition until an answer is received from the Lodge nearest his residence.

3. Petitions are to be received only at Regular Communications. [See Edict 16.6]

4. If a petitioner is physically defective because of deformity or being maimed, his eligibility shall be determined by the Lodge to which he applied, and if elected by the Lodge may receive the degrees after the action is approved by the District Lecturer in writing. [See Article VI, Section 7, amended Nov. 2000]

5. No applicant for initiation whose petition may have been rejected or objected to by any other Lodge shall be initiated in any other Lodge until the consent of a majority of the Lodge to which the applicant first petitioned is obtained for that purpose. [See Article VI, Section 11]

RECEIVING A PETITION FOR THE MYSTERIES OF MASONRY THE SECRETARY SHOULD:

1. Examine it carefully to see that all blanks have been filled in and that the signatures of the Petitioner, Recommender and Avoucher are in order.

2. Verify that the Recommender and Avoucher are both members of that Lodge. [See Article VI, Section 8]

3. Verify and note on the Petition the amount of the fee accompanying it. At least the amount of the Entered Apprentice fee is required. [See Article VI, Section 15]

4. Verify that the Petitioner is over 21 years of age and has resided in the State for the last 6 months.

5. If the Petitioner has been previously rejected, write that Lodge for a release in order to receive the petition. The Lodge receiving the request cannot act on the same at that meeting, but it must lie over until the next regular communication, at which time a majority of the members present may give consent. [See Edicts 11.8–11.10]

6. Determine which Lodge is the nearest to his residence. This determination is made by measuring in a straight line (as the crow flies). For a simplified method of determining the nearest Lodge a map can be measured and marked with the distances half way between your Lodge and each surrounding Lodge. If your Lodge is not the nearest to his residence, it will be necessary, after the Petition is presented to the Lodge, to write the Lodge nearest his residence in conformity with Article VI, Section 13. In the case where more than one Lodge meets in the same building, any one Lodge meeting in the building is considered sufficient.

7. Prepare to present the Petition to the Lodge at the next Regular Communication at which time the Worshipful Master should appoint a committee of three Master Masons from the Lodge to investigate the petitioner.

8. After the Worshipful Master appoints the committee, send notices of the appointment along with necessary information about the Petitioner to each member of the committee. If the Petitioner resides nearer another Lodge write that Lodge as set out in Article VI, Section 13, place the seal of the Lodge on the letter and mail promptly. Do not wait for a reply before notifying the investigation committee as they may conduct their investigation while waiting for a reply from the lodge nearest the petitioners' residence. If the Petitioner has out-of-town references and the committee desires, you may write those references.

9. When the letter, if any was required, from the Lodge nearest the Petitioner's residence is answered and the committee report is ready, be prepared to call it to the attention of the Worshipful Master so a ballot may be taken. After the ballot, write the Petitioner congratulating him if elected and notifying him of the date for initiation if the Worshipful Master has scheduled it. If the Petition was rejected, write the Petitioner so informing him and returning the fee which was enclosed with his petition. I knew one Secretary who used the approach to this letter as follows: If elected, he would write "I have the pleasure of informing you that you were unanimously elected..." or if rejected he shielded himself by writing "the Worshipful Master has instructed me to inform you..."

10. If the Petitioner is physically defective because of deformity or being maimed, after he is elected by the Lodge write your District Lecturer setting out the particulars and request dispensation to initiate the Petitioner.

QUARTERLY REPORTS TO THE GRAND SECRETARY

Reports similar to the Annual Report are to be made quarterly. Grand Lodge dues, except on reinstated members, and suspensions for non-payment of dues are not a part of the quarterly reports.

GRAND LODGE REQUIREMENTS:

1. Quarterly reports shall be made up to midnight the 14th day of the months of October, January and April respectively and be forwarded to the office of the Grand Secretary within thirty days thereafter. Each and all fees for the first degrees as specified in Article VI, Section 14, and each reinstatement for the quarter covered by the report shall be remitted to the Grand Secretary with said report. [See Edict 8.12]

WHAT THE SECRETARY SHOULD DO:

1. Fill in all the blanks on the form furnished by the Grand Secretary.
2. Tabulate the membership, starting with the final total on the last report.
3. Calculate the amount of dues and fees owed.
4. Sign and seal the report.
5. Mail the report with the proper remittance, if any, to the Grand Secretary.
6. File your copy of the report.

SUGGESTION:

Some Secretaries find it helpful to keep a sheet in their current work and enter all information on it which they will need to file on the Quarterly Reports, such as initiations, affiliations, transfers, demits, death, etc. When the time comes to file the report this is used as a check to be sure everything is included.

PETITION FOR REINSTATEMENT

Suspension of membership for non-payment of dues is effected at the Annual Communication of a Lodge on any member owing two years dues, or one year if the Lodge's bylaw so state. When one is suspended for non-payment of dues, he can regain membership only by reinstatement by the Lodge suspending him.

GRAND LODGE REGULATIONS:

1. When a Petition for Reinstatement is presented, the Worshipful Master may, or upon request of a member of the Lodge must, appoint a committee of three members of the Lodge to make an investigation. The committee, if appointed must report at a subsequent meeting. [See Edict 17.13]

2. If no committee is appointed, such application may be voted on at the regular communication at which it is presented. A two-thirds majority is required to reinstate. The Master may call for a rising vote or secret ballot, but if any member present requests a secret ballot it shall be done. In the case of a secret vote, use paper ballots instead of the ballot box. [See Edict 18.17]

3. The bylaw of a Lodge may specify an amount due to reinstate a member, provided such amount does not exceed that for which he was suspended. [See Edict 18.1]

4. If a member has been expelled or indefinitely suspended for unmasonic conduct or removed from the roster of the Lodge by his request, he must first be restored to the rights and privileges of Masonry before petitioning for reinstatement. [See Edict 31.1]

WHEN THE SECRETARY RECEIVES A PETITION FOR REINSTATEMENT HE SHOULD:

1. Examine it carefully to see that all blanks have been filled in and that the signature of the Petitioner is in place.
2. Verify and note on the Petition the amount of the payment accompanying it.
3. Prepare to present the Petition to the Lodge at the next Regular Communication at which time the Worshipful Master will call for a vote or appoint a committee.
4. If a committee is appointed, send out the notices; if a vote is taken and he is reinstated, prepare a dues card.
5. If a committee is appointed, but the member petitioning reinstatement does not reside where the committee can properly investigate, the Worshipful Master may request a Lodge near his residence to conduct an investigation as a courtesy for the Lodge. If he desires a Lodge in Alabama to conduct the investigation, the Secretary writes the desired Lodge and makes the request under the seal of the Lodge. If a Lodge from another Grand Jurisdiction is desired, the request is made through the Alabama Grand Secretary's office.

SECRETARY'S CASH BOOK

The Secretary's Cash Book is a valuable and permanent record of the financial transactions of the Lodge. It should be accurately kept and always up-to-date. The records kept in the Secretary's Cash Book are:

1. Entry and designation of source of each receipt of the Lodge, such as fees, dues, other (which includes contributions, purchase of supplies, income from fund raisers, etc.).
2. A record of every receipt turned over to the Treasurer or deposit made to a bank account from which the Treasurer writes checks. It will assist the auditors if the deposits are in the same sequence as the receipts.
3. Every check written or voucher against the Treasurer is recorded in the Cash Book.

TRANSFER PETITION/CERTIFICATE

Transfer is a method of moving membership from one Lodge to another without any period of non-membership because the receiving Lodge elects the applicant to conditional membership before he is released from his Lodge of membership. This is a simple method between two Lodges under the Grand Lodge of Alabama as it can be done directly between the two Lodges without passing first through the Grand Lodge. There are a number of other Grand Jurisdictions where it is recognized as well but the correspondence, like all correspondence between Lodges in Alabama and Lodges outside Alabama, must pass through the Grand Secretary's office. If you should send a Transfer Petition to a Grand Jurisdiction which does not follow the transfer practice, there is a sentence on the form which states "Should the law of your Grand Jurisdiction require that a demit be issued, please consider the alternate request for a demit and attach the demit to the duplicate copy of the Transfer form and return."

GRAND LODGE REGULATIONS:

1. Application to be made to any Lodge in this State. No residence requirement. [See Edict 17.6]
2. Entered Apprentices and Fellowcrafts as well as Master Masons may transfer. [See Edict 17.10]
3. The petition is referred to a committee and takes the same course as a petition for affiliation. [See Edict 17.7]
4. The effective date of a transfer is the date the Lodge he is transferring from releases him, not the date he is elected by the new Lodge. [See Edict 17.10]

WHEN SECRETARY RECEIVES A TRANSFER PETITION HE SHOULD:

1. Examine it carefully to see that all blanks of the top section have been filled in and that the signatures of the Petitioner, Recommender and Avoucher are in order.

2. Verify that the Recommender and Avoucher are both members of that Lodge.
3. Verify and note on the Petition the amount of the fee accompanying it, if any is required by the Lodge.
4. Prepare to present the Petition to the Lodge at the next Regular Communication at which time the Worshipful Master should appoint a committee of three Master Masons from the Lodge to investigate the petitioner.
5. After the Worshipful Master appoints the committee, send notices of the appointment along with necessary information about the Petitioner to each member of the committee.
6. When the committee report is ready, be prepared to call it to the attention of the Worshipful Master so a ballot may be taken.
7. After a favorable, unanimous ballot, fill in the center portion of the form (Notice to Lodge of Transfer of Membership), place the Lodge seal on it and mail both the original and duplicate to the Lodge from which the member is transferring.
8. The Secretary of the Lodge receiving the Transfer reports to the Lodge at a Regular Communication whether the transferring member owes the Lodge anything or if charges have been preferred and are pending. If neither is so and no one prefers charges against him, the Lodge will, without vote, issue the transfer by having the Secretary complete the bottom portion of the form (Transfer of Membership). He will retain the duplicate and return the original of the Transfer Petition to the Lodge electing the member on transfer. He should refund the member prepaid dues for the remaining part of the dues year.
9. The Secretary receiving the return of the Transfer Petition will enter the date of transfer as the date the releasing Lodge acted.
10. The new member is then added to the roll of the Lodge and its mailing list and he should be billed for dues on a pro rata basis until June 24.

DATES OF IMPORTANCE TO SECRETARIES

JANUARY

- 14 Quarterly report to Grand Secretary

APRIL

- 14 Quarterly report to Grand Secretary
- 15 (Approx.) Prepare member's dues cards and send dues statements.

JUNE

Last regular communication before (but not on) the 24th is annual communication

JULY

- 14 Annual report with Grand Lodge Dues and Assessments.

SEPTEMBER

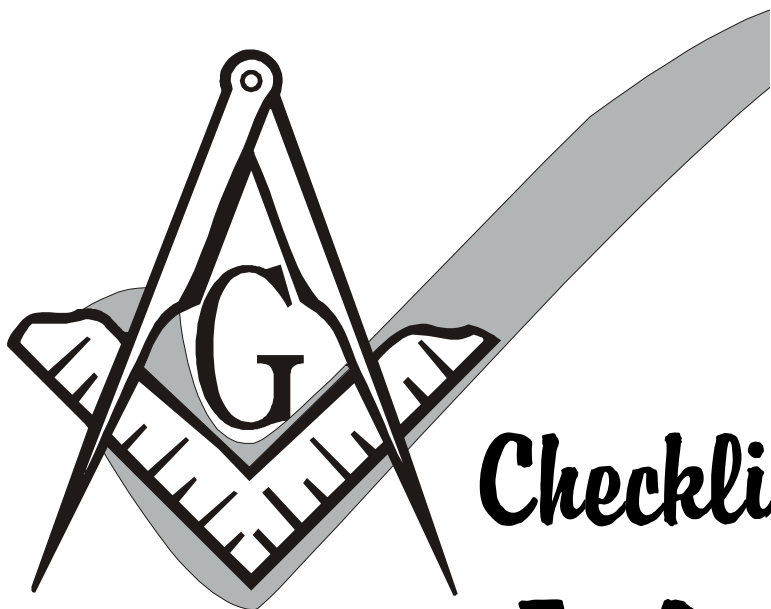
- 1 Forward funds collected for Masonic Home Endowment Fund in time for inclusion in fiscal year which ends September 30.

OCTOBER

- 14 Quarterly report to Grand Secretary

NOVEMBER

The Tuesday following the 3rd Monday (Nov. 19, 2002)
Grand Lodge Annual Communication



*Checklists
To Assist
Secretaries
of
Alabama
Masonic Lodges*