

Checklist for Lodge Officers

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The primary purpose of a Lodge is to help good men become better men, and in turn, the primary duty of a Master Mason is to seek additional light in Masonry and put that knowledge to use in his daily life.

One way the Lodge helps us to become better men is by giving us a chance to develop new skills. In the Lodge, we have the opportunity, for example, to work on projects, to take a part in the ritual, to read, do some research, and then give educational talks at meetings. And, as our skills mature, we also have the opportunity to assume leadership positions in the Lodge.

Masonry is all about learning. When a Brother is initiated an Entered Apprentice, he takes the first step in the learning process to become a Master Mason. When a Brother is raised a Master Mason, he takes the first step in a lifetime of learning to become a better man. And when a Brother is installed as a Junior Deacon, he takes the first step in the learning process to become a Worshipful Master and the leader of his Lodge.

It is up to each of us as Master Masons to take advantage of the opportunities of membership. There is a wealth of good information about Freemasonry at our fingertips – indeed, a reading list is available on the Grand Lodge website. In addition, there are a number publications you should read, things you should do, and Masonic events you should attend

in order to grow in Masonic knowledge and gain or refine your leadership skills.

The checklist, which I will shortly cover, is a good way to begin the learning process. Although it is primarily designed to guide a Brother who is starting in line to become the kind of Worshipful Master who will leave the Lodge in better condition at the end of his year than it was at the beginning – and have fun in the process, it has a larger purpose. The checklist provides guidance for any Brother who wants to better understand how his Lodge is run, how Grand Lodge works, and how he can gain the maximum benefits from being a member of our great Fraternity by increasing participation in its activities, and increasing his opportunities for fellowship.

Too often the task of learning about Masonic law and lore, and about Lodge and Grand Lodge operations, seems daunting, and it is unclear how to start. The checklist deals with this problem by providing the minimum body of knowledge a Brother and, especially a Lodge officer, should have, and it does so in an orderly and manageable fashion. Instead of trying to do everything at once, the checklist provides a time-line which, if followed, will allow the Brother starting through his Lodge's progressive line to gain the knowledge and skills necessary to be a successful Worshipful Master.

Following the checklist will be valuable to every Mason, but it is essential for a Lodge officer. Our Lodges need real leaders and capable administrators, but one does not develop these skills by osmosis. You need to put some work and some thought into the process of preparing to become an effective Worshipful Master, and this takes time, patience and perseverance. The rewards, however, are great. For the Lodge, it will

mean a successful year. For the Brethren in the Lodge, it will result in good programs, good projects, and good fellowship – and they will be proud to be a member of the Lodge and become more motivated and more active. And, for the Worshipful Master, it will result in his having one of the most rewarding experiences of his life.

The checklist, with its reading assignments and suggested events to attend, covers everything a Brother will need to do to become a successful Worshipful Master. Only two of the items listed are mandatory according to Masonic law: earning a Warden's Certificate and receiving The Degree of Past Master. Of course, a Brother also must serve as a Warden prior to serving as a Worshipful Master.

Now let us focus on a few points from the checklist. We particularly commend the first section of the checklist to all Master Masons and strongly suggest that every Brother take the Leadership Correspondence Courses that provide an easy way to become familiar with the important information found in the "Methodical Digest," the "Presentation Volume," and "Masonic Etiquette, Protocol, and Decorum" manual. We also strongly encourage every Brother to take advantage of the "Attend" subsections of the checklist. It is by participating in these events that you will develop the friendships and experience the camaraderie that is so much a part of Freemasonry.

The second section, again with its readings and suggested events to attend, is for the Junior and Senior Deacons. You will note that the checklist is geared toward teaching an officer what he needs to know next year, rather than having him try to learn the duties of a particular office

when he already is serving in that office. Thus, a Deacon should receive The Degree of Past Master and earnestly work toward earning his Warden's Certificate.

The third section is for the Junior Warden. This officer has very little ritual to perform in a stated communication and in conferring the three Degrees, and so this is a perfect time for him to begin planning for his year in the East. Note the addition of "Meet With," and "Identify" subsections in the checklist, and keep in mind that it is essential to attend all of the listed events.

The fourth section is for the Senior Warden. Here the thrust of the checklist has moved from becoming prepared, to one of action. This is also the time to step back and ensure that everything is in place and you are properly prepared – thus the focus of the checklist is on the "Complete," "Meet With," and "Review" subsections.

The final section is for the Worshipful Master, and here the focus is not only on what is necessary for him to do to have a successful year, but also on the responsibility to prepare those who will follow him as leaders of his Lodge.

In summary, the checklist is a step-by-step guide to prepare a Brother to serve as Worshipful Master. It provides him with the minimum body of knowledge in an orderly and manageable fashion and, as an important additional benefit, it provides guidance to make good men better men, which I noted at the very beginning of this talk is our primary goal. Now let me quickly walk you through the checklist. Note also that the checklist titled "Suggested Minimum Steps for Lodge Officers" is online at: <http://www.grandlodgeofvirginia.org/education/publications/>

SUGGESTED MINIMUM STEPS FOR LODGE OFFICERS:

❖ Potential Lodge Officers

- Read:
 - “Master Masons and Prospective Lodge Officers.”
 - “A Primer for the Junior and Senior Deacons.”
 - “Masonic Etiquette, Protocol, and Decorum.”
- Complete: all of the lessons of the Leadership Correspondence Courses (LCC).
 - The LCC helps you develop a good familiarity with the Methodical Digest, which you will need as a Worshipful Master. Ensure that you are using an up-to-date version.
 - The LCC helps you to develop a familiarity with the Presentation Volume, which you will need as Worshipful Master.
- Attend:
 - Grand Annual Communication (starts the Friday preceding the second Monday in November).
 - A Division Leadership Conference (typically during the spring of the year).
 - Subordinate Lodge Officer Training Session(s) offered by your DEO.
 - District Educational / Ritual Schools of Instruction.
 - Lodge Officer Meetings held by your Worshipful Master (You should advise the Worshipful Master of your interest and request his permission to attend since you are not yet an officer).
 - The Grand Master’s Official Visit to your district.

❖ Junior / Senior Deacons

- Read:
 - “A Primer for the Junior and Senior Wardens.”
 - “Lodge Financial Manual.”
 - “A Handbook for Masonic Trials.”
 - “Planning Your Year in the East.”
- Attend:
 - A Masonic Funeral Service (if one is held in your area).
 - Grand Annual Communication (GAC).
 - A Division Leadership Conference (DLC) (Meet the Grand Lodge Officers).
 - Subordinate Lodge Officer Training Sessions offered by your DEO.
 - District Educational / Ritual Schools of Instruction.
 - Lodge Officer Meetings held by your Worshipful Master.
 - Regularly attend Lodges within your Masonic district.
 - Reid James Simmons Academy of Masonic Leadership (RJSAML).
 - The Grand Master’s Official Visit to your district.
- Receive: “The Degree of Past Master.”
- Become familiar with All Grand Lodge Programs, etc.
 - Masonic Community Blood Program, Child ID, Masonic Home of Virginia, Grand Lodge Scholarship Fund, Masonic Relief Fund, Library, Museum and Historical Foundation, Mentorship Program, Bring a Friend Night, Bring a Mason Night, Community Builders Awards, District Traveling Gavel, Life Membership in Perpetuity, Permitted Approach to Non-Masons, Youth Organizations.
 - “District Team” (The District Officers who are there to help you and your Lodge. Their duties typically advance some Grand Lodge Program, function or area of emphasis).
- Additionally: Earnestly work on earning your “Warden’s Certificate.”

❖ **Junior Wardens**

- Read:
 - “A Primer for the Worshipful Master.”
 - “A Lodge Officers Training Tool.”
 - “Meeting Management.”
 - “For the Investigating Committee.”
- Attend:
 - Grand Annual Communication (GAC).
 - A Division Leadership Conference (DLC).
 - Subordinate Lodge Officer Training Sessions offered by your DEO.
 - District Educational / Ritual Schools of Instruction.
 - Lodge Officer Meetings held by your Worshipful Master.
 - Regularly attend Lodges within your Masonic district.
 - Start attending Lodges outside of your Masonic district.
 - Reid James Simmons Academy of Masonic Leadership (RJSAML).
 - The Grand Master’s Official Visit to your district.
- Earn: Your Warden’s Certificate.
- Meet With:
 - Your Grand Lodge Counterpart, the Grand Senior Warden at the DLC
 - District Deputy Grand Master Select for your year (they are selected two years in advance, but no earlier than May 1st of each year, and usually, it is at least August before a decision is made.) You may wish to ask the Grand Senior Warden to let you know when he has made a selection.
- Identify:
 - Possible plans and goals for your year as Worshipful Master.
 - Potential programs / speakers for your year as Worshipful Master.
 - Budgetary considerations.

❖ Senior Wardens

□ Complete:

- Your plans and establish your goals.
- Formulating your programs / speakers.
- Your budget.

□ Meet with:

- The Deputy Grand Master at the Division Leadership Conference.
- A member of the Lodge Services Committee.
- A member of the Membership Committee.
- The District Deputy Grand Master Select and the District Officers. (This will be scheduled by the DDGM Select after the DDGM Conference. The meetings usually take place towards the end of September of each year).
 - Review the incoming Grand Master's plans, goals, schedules, objectives, proposed Executive Orders and Proclamations.
 - The District Officers are there to HELP you and your Lodge, use their expertise!
- The Brethren from your Lodge to verify their willingness to serve on committees, and to discuss your goals and plans with them, and clearly specify what they will be asked to accomplish.
- The Brethren from your Lodge to verify their willingness to serve as a Lodge Officer, and to discuss your goals and plans with them.
- Meet with the Brethren you will appoint to the following positions to discuss your goals, plans and expectations: "Lodge Masonic Home Ambassador," "Lodge Child ID Coordinator," "Lodge Blood Coordinator," "Lodge Membership Chairman," "Lodge Educational Officer," and the "Lodge Instructor of Work."
- The Secretary of your Lodge after he attends the Secretary's Conference.
- The Lodge Trustees.

□ Attend:

- Grand Annual Communication.
- A Division Leadership Conference.
- Subordinate Lodge Officer Training Sessions offered by your DEO.
- District Educational / Ritual Schools of Instruction.
- Lodge Officer Meetings held by your Worshipful Master.
- Reid James Simmons Academy of Masonic Leadership.
- Regularly attend Lodges within your Masonic district.
- Regularly attend Lodges outside of your Masonic district.
- The Grand Master's Official Visit to your district.

□ Review:

The Requirements for the James Noah Hillman Award.
<http://www.grandlodgeofvirginia.org/awards/Hillman.pdf>.

- Any check-lists your Lodge may have formulated listing recurring local events.
- The oath, charges, and obligations you will take when installed as Worshipful Master.

❖ **Worshipful Masters**

- Appoint your committees and reinforce the goals and responsibilities you communicated to them the preceding year. Define when, where, and how they are to report, and what they are to do / accomplish.
- Hold REGULAR Lodge Officer Meetings – quarterly at a minimum, more often as necessary.
- Attend:
 - Grand Annual Communications (GAC).
 - A Division Leadership Conference (DLC).
 - Subordinate Lodge Officer Training Session offered by your DEO.
 - District Educational/Ritual Schools of Instruction.
 - Lodge Officer Meetings.
 - Regularly attend Lodges within your Masonic district.
 - Regularly attend Lodge outside of your Masonic district.

- Reid James Simmons Academy of Masonic Leadership (RJSAML).
- The Grand Master's Official Visit to your district.
- Regularly consult the Methodical Digest (*please use an up-to-date version*).
- Make the meetings worth attending. The Brethren should leave each meeting knowing that their valuable time was well spent. Have good quality educational programs at each meeting if possible.
- Support:
 - The Brother you nominated for Junior Deacon as he works his way through the line and becomes Worshipful Master of the Lodge. You are his mentor!

❖ **Additional Help**

- Ask for Help and Advice:
 - The Past Masters of your Lodge for advice (BUT, please keep in mind that things DO change, and may have changed since they served as Worshipful Master).
 - Your District Educational Officer (DEO) for help. His primary responsibility is the training of the Subordinate Lodge Officer. If he does not know the answer to your question, he should secure an answer for you through his Division Provost.
 - Your Lodge Secretary (BUT, please keep in mind, the Worshipful Master, NOT the Lodge Secretary rules and governs the Lodge and must make all policy decisions).
- Publications Available for free download:
 - <http://www.grandlodgeofvirginia.org/education/publications/index.htm>
- Grand Lodge of Virginia Web Site
 - <http://www.grandlodgeofvirginia.org/>
- James Noah Hillman Award:
 - <http://www.grandlodgeofvirginia.org/awards/Hillman.pdf>
- Executive Orders, Proclamations, etc.
 - http://www.grandlodgeofvirginia.org/ExecOrd_Proc_All.pdf
- Leadership Correspondence Course Registration:
 - http://www.grandlodgeofvirginia.org/education/reid_j_simmons_academy/registration.pdf
- Publications for sale:
 - Grand Lodge, A.F. & A.M., of Virginia
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REVISED: 10/18/2009