

## **Class 1: Section 3 Balloting and Insuring Degrees are done.**

1. Receive petitions by hand in Chapter or by mail.
  - a. Petition Verification as explained by PGHP Eppig earlier
    - i. Must be a Mason in good standing preferably in a MD Lodge.
      1. GLMMS Required if a MD Mason.
      2. Address Required
    - ii. Must be a resident of Maryland for at least six months.
    - iii. Must have exemplified the Master Mason Catechism.
    - iv. If any of the above is not valid contact the Grand Secretary at once.
    - v. Prepare a Tracking Log for the Candidates which will show benchmark dates:
      1. Notification
      2. Balloting
      3. Degrees
      4. Absences and Reschedule Dates
  - b. Notify the Candidates of the Date of Action...Voting and Degree Conferral
    - i. Time and place to arrive.
    - ii. Customary Dress – Lodge attire.
    - iii. Bring petition signer if possible and other YR friends.
    - iv. Request confirmation of attendance or conflict to the Secretary by email. Encourage exchanges of questions.
  - c. Day of Conferrals (Membership Committee)
    - i. Have a Greeter to log in the expected candidates.
    - ii. Have someone prepared to read the PROLOGUE of the Degree(s)
    - iii. Answer any questions about where in the story of Masonry the Candidates are...if not answered in the PROLOGUE.
    - iv. Review any information necessary for the candidates to know in the Degree. Passwords and/or Signs
    - v. Wait with Candidates until the Officer assigned to lead them comes to collect them.
    - vi. Help see the Candidates are properly prepared...aprons, and in the MkM Degree no money for the principal Candidate.
  - d. Inform the Grand Secretary of RA Degree Conferrals
    - i. As early as possible for RAM Magazine subscriptions
    - ii. In the Annual Report with all contact information
  - e. Grand Secretary will enter Change of Membership Status Information in the Maryland YR Database.
  - f. Grand Secretary will contact RAM Magazine to enter new memberships, and other Change of Status info as provided by the Chapter Secretary.

## **Class 3: Section 1 Membership Management**

1. Membership Records: The Backbone of every Fraternal Body
  - a. Entry Dates
    - i. Petition for Degrees Received
    - ii. Petition for Affiliation:
      1. Plural Members (In state)
      2. Dual (Out of State)
    - iii. Degree Dates
    - iv. Suspensions: By Lodge Action
    - v. Suspensions: By Chapter Action
    - vi. Demits
    - vii. Deaths
2. How to keep Membership Records
  - a. Hard Copy
    - i. Index Cards
    - ii. Register Book
  - b. Digital Records
    - i. Spread Sheets (EXCEL)
    - ii. Databases (ACCESS)
      1. Grand Chapter & Grand Council use ACCESS (Restricted by the Grand Bodies but one common Database)
      2. Grand Commandery uses the GE Membership Management System (Restricted by GE)
      3. Grand Lodge/MD use the Grand Lodge Membership Management System (restricted by GLMD)
    - iii. Back Up Data:
      1. Thumb Drives
      2. External Hard Drives
      3. Cloud Storage
        - a. Single access (One Drive)
        - b. Multiple Access (Drop Box)
          - i. Choose a trusted officer to share access to membership data.
          - ii. Restrict who can change data changes.
      4. Back-up Services
        - a. Acronis True Image
      5. Hard Copy...A true paper copy periodically.

3. Information for Personal Records
  - a. GLMMS Number: Should be supplied with Petitions.
  - b. Full Name: First, Middle, and Last Name...and suffixes.
  - c. If a Lodge PM, please append as a name suffix
  - d. USPS Address
  - e. Email Address if supplied.
  - f. Phone Numbers (Grand Bodies want only one principal contact number)
  - g. Principal Lodge Affiliation
  - h. Date of MM Exemplification
  - i. Date of Change of Status (Death, Suspensions, Demit)
  - j. Date of Last Change of Record

### **Class 3: Section 3 Advantage of a Database v Spreadsheet**

A Database can be constructed as a big Spreadsheet...or it can be built as a multi-dimensional information beast.

Databases can create and saving many different queries and reports in multiple layers...queries built on Tables, queries built on other queries.

Queries can output to Spread Sheets...which is how I produce form letters, dues bills, and addressed envelopes.

Reports can take limitless output forms...like our Dues Cards, and Credential Committee Sign-in Sheets.

A Database is likely too much horsepower for a local body. But it is very good at cross referencing information for multiple organization like York Rite Meetings, Priory of York Cross of Honor, and Council of Anointed High Priests...whose memberships are comprised of specific classes of qualified Companions and Sir Knight.

The Grand Encampment does not track Chapter or Council membership data.

The Grand Lodge does not track Chapter or Council membership data.

The MD YR Database does not link to either of the above...and in some cases does not duplicate the data available from these other sources in all cases. Some information is just too volatile to track, like phone numbers and email addresses.

## **Class 3: Section 4 The Annual Report**

1. Organizational Information
  - a. Name
  - b. Location (USPS Address)
  - c. Meeting Location if different
  - d. Meeting Nights
2. Elected officers
  - a. Presiding Officer & Contact Information
  - b. Second Officer & Contact Information
  - c. Third Officer & Contact Information
  - d. Secretary or Recorder and Contact Information
  - e. May add Treasurer or those having signature authority on financial Accounts.
3. Past Presiding Officers
  - a. Voting Members in the Grand Bodies with Dais Officers
  - b. Contact information is not required except as Change of Status info.
4. Newly Admitted Members
  - a. GLMMS
  - b. Full Name (First Middle Last)
  - c. PM Status (if known)
  - d. USPS mailing address.
  - e. Email Address if provided.
  - f. Phone Number if provided.
  - g. Date of Exaltation or Greeting
5. Newly Affiliated Members (not part of the Assessment Count)
  - a. These members are entered in the MD YR Database as CH2, CH3, CO2, CO3 and in some cases as CHHon, or COHon.
6. Newly Reinstated from Change of Status events below.
7. Change of Membership Status
  - a. DEATHS.... best date known...or date of information supplied
  - b. Suspension by Lodge Action: automatic YR Suspension which cannot be reversed without confirmation in GLMMS of return to Good Standing.
  - c. Suspension by the Local Body: Usually Non-Payment of Dues (NPD) which are reversible by Local Body Action.
  - d. Demit: Voluntary withdrawal from membership by a Companion in Good Standing. Cannot be denied...but you can offer alternative standing like Remission of Dues to maintain Good Standing for special circumstances...like extreme age, or long-standing membership.
8. List of Plural Memberships
  - a. Confirms status and excused assessment count.
9. List of Remission of Dues and reasons.
  - a. Religious Office
  - b. Extreme Medical circumstance Physical or mental conditions
  - c. Prior service- does not excuse assessments.
10. Change of Addresses.

## 11. Tabulation Page

- a. Name of Organization
- b. Membership Total at the beginning of the Year
- c. Additions
  - i. Exaltation/Greetings
  - ii. Re-instatements
  - iii. (Plurals DO NOT COUNT)
  - iv. Dual Memberships...DO Count in totals
- d. Reductions
  - i. Deaths
  - ii. Suspensions by Lodge Action
  - iii. Suspension by Body Action
  - iv. Demit
- e. Membership at the End of the Year
- f. Adjustment for Life Memberships in General Grand Chapter or Council
- g. Final billable total
- h. Extension of Billable Total X Annual Assessment Fee
- i. Chapter Only: \$30.00 CAHP Fee
- j. List of Checks supplied with Report.
  - i. Assessment Fees to Grand Body
  - ii. Charitable Donation on separate checks & Check #'s
    1. Royal Arch Research Assistance (RARA)
    2. D.Ross Vansant Scholarship Fund (DRV)
    3. Cryptic Mason Medical Research Foundation (CMMRF)
- k. Copy of the Body's IRS 990N form filled that year Confirmation Email.

### **Why is the Annual Report so important?**

- Contact information of key officers.
- List of qualified voting members.
- Entry of new members on the rolls.
- Change of Status on members no longer in good standing.
- Calculation of fees to support the Grand Bodies.
- Confirmation of current status with IRS 990N requirements.