Secretary Guide

A monthly guide for the lodge secretary to assist in the performance of his duties



Created April 2015

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January

January begins the fiscal year for every lodge and it signifies the need and requirement to review the previous year. Even if the lodge installation has not yet occurred, the following actions need to be done:

Stated meeting check list:

- ✓ **Current year budget presented and approved by lodge**
- ✓ **Dues remission recommendations presented by Charity Committee (M, SW, JW)**
- ✓ **Take minutes, have December minutes signed after approval by lodge and save the signed copies in the Vault**

If the lodge installation occurred prior to the January stated meeting, the Master (or Senior Warden if the installation has not yet occurred) will present the current year budget and, by vote, gain approval by the members present who are in good standing, meaning they possess a current dues card.

The charity committee of the lodge (Master, Senior Warden and Junior Warden per CMC section 806.000) will present their recommendations for dues remittance to the lodge. The lodge, by vote will approve the recommendations. See the glossary for remissions for assistance in recording dues remissions in iMember and issuing a dues receipt.

Other duties to perform during the month:

- ✓ **Begin working with Treasurer on annual reports to the lodge for February stated meeting**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review February actions**

Annual membership and financial reports are required to be presented at the February stated meeting (CMC section 805.220D and 805.230B), so begin to compile your financial reports and membership data in January. Work with the lodge treasurer to ensure that the financial reports match.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for February so you are prepared.

February

February is the time to present your previous year's summary of activities. It also is the time to begin working with the lodge's member retention committee to start collecting current year's dues.

Stated meeting check list:

- ✓ **Annual financial report presented by Treasurer**
- ✓ **Annual investment committee/lodge trustees report**
- ✓ **Annual membership report and monies received presented by Secretary**
- ✓ **Annual financial and status report presented by Hall Association (if applicable)**
- ✓ **Take minutes, have January minutes signed after approval by lodge and save the signed copies in the Vault**

The information to be presented at the February stated meeting concerning the annual financial and membership reports are outlined in the California Masonic Code (CMC section 805.220D and 805.230B). The secretary's report to be used is found on the Member Center under Forms/Membership.

Other duties to perform during the month:

- ✓ **Provide member retention committee list of members who have not paid their dues for current year.**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review March actions**

The lodge's member retention committee should begin to make contact with all members who have not paid their current year's dues. Run the delinquent dues report in iMember and provide the copy to the committee.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for March so you are prepared.

March

March is the month to begin the suspension for non-payment of dues processes and the time to conclude any actions pertaining to the previous financial year.

Stated meeting check list:

- ✓ **Take minutes, have February minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Send notices of intent to suspend to members who have not paid previous year's dues**
- ✓ **If not using Intacct, submit annual financial report through the Member Center (March 15)**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review April actions**

For members who have a single lodge membership, send them a letter of intent to suspend via certified return receipt mail listing the April stated meeting as the date in which the lodge will declare them suspended. For members with multiple lodge memberships, the CMC requires a 60 day notice (section 804.165C), therefore the notice should list the May stated meeting (if it is at least 60 days away from the date of the notice). See the glossary for suspensions for non-payment of dues for assistance in recording in iMember.

The prior year's annual financial report of the lodge is due to Grand Lodge on or before March 15 (CMC section 805.230B). If the lodge is using Intacct, the annual report does not need to be submitted. If the lodge is not using Intacct, it is the duty of the secretary (CMC section 805.230B) to submit the report using the link on the Member Center home page under the heading Reports & Features/Lodge Financial Statements. The secretary, assistant secretary and treasurer all have edit access to the report on the Member Center.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for April so you are prepared.

April

This month you will begin recommending suspensions for non-payments of dues along with continual partnership with the member retention committee, outreach to members who have not yet paid the current year's dues.

Stated meeting check list:

- ✓ **Recommend suspensions for non-payment of dues (members with single lodge memberships)**
- ✓ **Take minutes, have March minutes signed after approval by lodge and save the signed copies in the Vault**

For all single lodge members who had not paid previous year's dues and to whom you sent a certified, return receipt requested notice of intent to suspend you will recommend to the Master that they be declared suspended for non-payment of dues. The Master simply declares them suspended for non-payment of dues; there is no lodge vote to be taken. See the glossary for suspension for non-payment of dues on how to record the information in iMember.

Other duties to perform during the month:

- ✓ **Provide retention committee list of members who have not paid current year's dues.**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review May actions**

The lodge's member retention committee should continue to make contact with all members who have not paid their current year's dues. Run the delinquent dues report in iMember and provide an updated copy to the committee.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for May so you are prepared.

May

Continue recommendations for suspensions for non-payment of dues and begin to review the lodge roster in preparation for the end of the Grand Lodge masonic year, June 30.

Stated meeting check list:

- ✓ **Announce suspensions (members with multiple lodge memberships) and have the lodge approve**
- ✓ **Take minutes, have April minutes signed after approval by lodge and save the signed copies in the Vault**
- ✓ **Review June actions**

For all plural and multiple lodge members who had not paid previous year's dues and to whom you sent a certified, return receipt requested notice of intent to suspend 60 days ago you will recommend to the Master that they be declared suspended for non-payment of dues. The Master simply declares them suspended for non-payment of dues; there is no lodge vote to be taken. See the glossary for suspension for non-payment of dues on how to record the information in iMember.

Other duties to perform during the month:

- ✓ **Prepare and submit 990 and 199 tax forms – due May 15**
- ✓ **Review membership roster in preparation for end of Grand Lodge Membership Year (June 30)**
- ✓ **Record any dues payments received in iMember and issue receipt**

The IRS and Franchise Tax Board (FTB) require annual filings for all masonic lodges. These forms are due May 15 unless you file for an extension. The CMC does not state who is responsible for preparing and submitting these forms, but both the treasurer and secretary are responsible for insuring they are filed as this duty directly ties to the responsibility of your offices. (CMC section 805.220 E and 805.230 O). If your lodge does not file these forms, it could lose its tax exempt status.

Begin to review the lodge's complete roster as the membership year for Grand Lodge ends on June 30 and the per capita will be based upon your roster on that date. Search the social security death index for older members (www.genealogybank.com/gbnk/ssdi) or search Google for obituaries placed in newspapers. Insure that the number of degrees matches your records same with remissions, suspensions and deaths. You can view the roster tally on the Member Center under Membership Reports/Activity/Lodge Activity Summary.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for June so you are prepared.

June

June can be a busy month for the lodge secretary. It is important that this month all of the member transactions get recorded in iMember before June 30.

Stated meeting check list:

- ✓ **Take minutes, have May minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Review membership roster in preparation for end of Grand Lodge Membership Year (June 30)**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review July actions**

Continue to review the lodge's complete roster as the membership year for Grand Lodge ends on June 30 and the per capita will be based upon your roster on that date. Search the social security death index for older members (www.genealogybank.com/gbnk/ssdi) or search Google for obituaries placed in newspapers. Insure that the number of degrees matches your records same with remissions, suspensions and deaths. You can view the roster tally on the Member Center under Membership Reports/Activity/Lodge Activity Summary.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for July so you are prepared.

July

There are few requirements for the month of July, but your lodge may be keeping you busy with other activities. Take this month to prepare for the busy fall which includes elections, dues invoicing and collection.

Stated meeting check list:

- ✓ **Take minutes, have June minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Begin working with Treasurer on semi-annual reports to the lodge for August stated meeting**
- ✓ **Provide retention committee list of members who have not paid current year's dues**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review August actions**

Semi-annual membership and financial reports are required to be presented at the August Stated Meeting (CMC section 805.220D and 805.230B), so begin to compile your financial reports and membership data in July. Work with the lodge treasurer to ensure that the financial reports match.

The lodge's member retention committee should continue to make contact with all members who have not paid their current year's dues. Run the delinquent dues report in iMember and provide an updated copy to the committee.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for August so you are prepared.

August

August is the month to present to the lodge its mid-year financial and membership standings as well as any other information as requested. It is also the month to process per capita payments.

Stated meeting check list:

- ✓ **Semi-annual financial report presented by Treasurer**
- ✓ **Semi-annual membership report and monies received presented by Secretary**
- ✓ **Semi-annual financial and status report presented by Hall Association (if applicable)**
- ✓ **Take minutes, have July minutes signed after approval by lodge and save the signed copies in the Vault**

The information to be presented at the August stated meeting concerning the semi-annual financial and membership reports are outlined in the California Masonic Code (CMC section 805.220D and 805.230B). The secretary's report to be used is found on the Member Center under Forms/Membership.

Other duties to perform during the month:

- ✓ **Pay per capita invoice once received.**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review September actions**

The per capita invoice will be mailed on or near August 1, once the invoice arrives submit the payment as soon as possible. California Masonic Code Section 809.520 provides that the lodge can pay its per capita (money due to Grand Lodge) without consent of the lodge. Payment must be received before the start of the Annual Communication. If it is not received the lodge

will not be eligible to receive voting representation during the sessions and the lodge name will be recorded in the minutes of the Annual Communication has having not paid their per capita.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for September so you are prepared.

September

September is the time for preparing your lodge for annual communication. Reviewing legislation, per capita and Grand Master recommendations and decisions are important tasks that each lodge should undertake as a lodge.

Stated meeting check list:

- ✓ **If necessary, elect the lodge's elected representative for annual communication**
- ✓ **Take minutes, have August minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Review legislation for upcoming annual communication**
- ✓ **Submit elected representative form (if applicable) for annual communication**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review October actions**

As secretary, you should review all of the proposed legislation, Grand Master decisions and recommendations and per capita proposal by the Senior Grand Warden. Some pieces of legislation (including Grand Master decisions and recommendations) will impact the work you do and how you do it. Also, understanding what per capita may change too will affect the dues total for your lodge. You can access and view the current proposed information for annual communication on the Member Center under Forms/Annual Communication.

If the lodge master, senior warden and junior warden are unable to attend annual communication, the lodge may elect a representative to carry the ballot vote on their behalf. The elected representative takes the place of all of the pillar officers, not just one. Once chosen at the stated meeting, submit the required form to the Grand Secretary's office. The form is located on the Member Center under Forms/Annual Communication.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for October so you are prepared.

October

October begins the new billing cycle for the upcoming calendar year dues. Invoices need to be sent, life membership receipts issued and preparation for annual elections should begin.

Stated meeting check list:

- ✓ **Take minutes, have September minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Send out dues invoices for upcoming year**
- ✓ **Issue dues receipts for upcoming year to life members (if applicable)**
- ✓ **Notice to all members of election of officers at November stated meeting**
- ✓ **Provide retention committee list of members who have not paid current year's dues**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review November actions**

Immediately following annual communication, dues notices should be sent to all active masons of the lodge. Dues notices are not required in the California Masonic Code; however, your members will not remember to pay them by January 1 if they do not receive a notice. This notice can be sent via email or through regular mail. There is no standard form to use, feel free to create your own that works for your lodge.

Once dues notices have been sent for the upcoming year, you should issue the life membership receipts for the upcoming year. See the glossary for life membership for assistance in recording dues payments and issuing receipts.

The lodge's member retention committee should continue to make contact with all members who have not paid their current year's dues. Run the delinquent dues report in iMember and provide an updated copy to the committee.

Continue to process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for November so you are prepared.

November

Annual election of officers and tri-annual election of hall association directors (if applicable) occur this month as well as preparations for the upcoming installation.

Stated meeting check list:

- ✓ **Election of Officers**
- ✓ **Take minutes, have October minutes signed after approval by lodge and save the signed copies in the Vault**

Election of officers is a required activity of the lodge at the November stated meeting (CMC section 805.410). Soon after, you will need to record the elected officers into iMember. See the glossary for Officers for assistance in entering the lodge officers, both elected and appointed. ****Note: Your access to iMember is directly tied to your term of office recorded in iMember. It is important to record the secretary's election, installation date and end date as soon as possible to insure no disruption in access to iMember.** If known, record the incoming appointed officers at the same time.

Other duties to perform during the month:

- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review December actions**

Process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for December so you are prepared.

December

For many lodges, December is the month of their installation. It is also time to think about the coming year and its activities. It is important that by this time, the incoming lodge officers (elected and appointed) have been entered into iMember.

Stated meeting check list:

- ✓ **Take minutes, have November minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Installation of officers**
- ✓ **Send out dues reminder notices**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review January actions**

Your lodge may have many tasks for its lodge secretary when it comes to the installation. Work with your lodge executive committee (see glossary for definition) to understand your role.

For all of the members who have yet to pay their upcoming dues, an email reminder should be sent. Remind them that as of January 1 they are no longer in good standing (see glossary for definition) and will not be able to vote on any lodge actions until their dues are paid. Run a delinquent dues report in iMember to obtain your email list.

Process dues payments as they come in by recording in iMember and issuing dues receipts. If any requests come in regarding requests for dues remissions, forward the information directly to the charity committee for their investigation. See the glossary for dues payments for assistance in recording dues payments and issuing dues receipts.

Review the requirements and other duties for January so you are prepared.

Other Duties

Throughout the year, a lodge secretary may perform many other activities that do not necessarily fall within a particular month every year. Below is a list of those items. You may want to add to the list items that are specific to your lodge.

Application rejections

Occasionally, the lodge does reject an applicant and sometimes the duty to inform the candidate falls on the lodge secretary. Create some standard messaging to address the concerns an applicant may have. To enter in the rejection in iMember, review pages 90-91 of the iMember manual.

Budgets

The Senior Warden is responsible for creating his budget for his upcoming term; however, he should not work on this alone. The budget team should include the senior warden, treasurer and secretary and the process should begin early in the calendar year. Be sure to include expenses related to the annual communication, secretary and treasurer retreat and the master and wardens retreat. If you are using Intacct, contact the Intacct team for assistance in building a budget.

Bylaw Amendments

There are many actions that a lodge must take that require the lodge bylaws to be changed: change in meeting day or time, change in dues, change in fees and change of lodge name. Bylaw amendments have a defined proves that is outlined in CMC section 802.020 and the forms to be submitted to the Grand Secretary are located on the Member Center under forms/by-law amendments. The process takes place over two stated meetings.

Communication with Other Jurisdictions

Master Masons in California have the ability to travel and visit other jurisdictions and to join other jurisdiction lodges. Entered Apprentice and Fellow Craft Masons may join other lodges within California and out only as allowed by the lodge (CMC section 804.240, 804.270, 804.275) and the other jurisdiction. All communication with other Grand Lodges must be done through the Grand Secretary's office per the recognition agreement the Grand Lodge of California has with other Grand Lodges. Work with the Member Services Department to assist you with these communications.

Demits

A demit is a request by a mason to end his affiliation with a lodge. Demits for a Master Mason may be issued upon his written request for demit over his signature and once ordered by the Master at a stated meeting (CMC section 804.130). Demits for an Entered Apprentice or Fellow Craft Mason must be approved by the lodge (CMC section 804.135). No verbal requests or requests from family members may be accepted. See the glossary for demits for assistance recording demits in iMember. Unused dues must be returned to a demitted mason (CMC section 809.350).

Dispensations

The Grand Master and Inspector (on some issues) have the authority to approve specific activities by a lodge that fall outside the California Masonic Code: ballot on an application without an investigation, wear masonic clothing and regalia at a public meeting, parade or public procession, receive and act upon an application of a rejected applicant without the necessary waiting period, temporary change in meeting place, hold a special meeting in an alternate location, special election of officers. Each dispensation has a different requirement. Please review the CMC sections 404.140 and 405.060 and the required forms for submission to the Inspector or Grand Secretary on the Member Center under forms/dispensations.

Masonic Funeral

Funeral requests come whenever there is a need. The lodge should have qualified funeral masters, as qualified by the Inspector. Masonic funerals are performed free of charge for all masons (EA, FC and MM) who are not demitted, suspended or expelled from Masonry. A lodge may perform a funeral service for a member who was suspended for non-payment of dues but may not provide financial assistance for the services. Funerals are covered in the CMC under sections 405.050, 804.860, 804.820, 807.020, 809.550, 812.030, and 812.040.

Masonic Outreach Services (MOS)

Every mason, their wife or widow, their minor children and in some cases their mother are eligible for assistance through the Masonic Homes of California's Masonic Senior Outreach, Masonic Family Outreach and Masonic Center for Youth and Families. Assistance ranges from referral services for home care, assisted living and long term care facilities, counseling for the family and financial. If you have a member who may be in need of services, regardless of age, have them or their families contact Masonic Outreach Services at 888/466-3642. It is preferred that the member or his family call so

that case management begins at that moment. Also, many members are often confused why Masonic Outreach is contacting them based upon a referral of another member.

Masonic Trials

Masonic trials can occur when a master mason in good standing files charges of unmasonic conduct against any mason (EA, FC or MM). Unmasonic conduct is defined in the CMC under section 1401.010 and 1401.020 and the form to submit charges is located on the Member Center under forms/membership. If your lodge is involved in a Masonic trial you will receive specific communications from the Grand Secretary as to your role. You may also be contacted by the trial master to assist in the trial.

Restorations

Members who have been suspended for non-payment of dues or by masonic trial have the opportunity to be restored to good standing by the lodge. Expelled members also have an opportunity to seek restoration through Grand Lodge only. Specific steps are required for restoration in each case. See the glossary for restorations for assistance in these processes.

Trestle boards

Some lodges ask that the lodge secretary manage its trestle board. You can delegate this task to your assistant secretary or a committee. Things to consider when publishing a trestle board: electronic version vs. printed, bulk mail permits and payment of, artwork and copyright issues, article generation and management of others. These items are just a few items; research what may be necessary for your lodge.

Widows

As a lodge, you take an obligation to each other's wives and families. Managing the widows of former masons can be a difficult process as a lot of information is not known about widows. It is important to obtain as much current and identifiable information (date of birth, anniversary, full name) of a current wife/partner while the member is living so the lodge may continue to outreach to her upon his passing. Creating an engaged widows committee is key to successful roster management and outreach. Include EA and FC masons on this committee as well as other active widows. Roster reports can be printed through the iMember Simple QBE report as well as the Member Center under Membership Reports. A widow's record is automatically created once a date of death is entered for her husband and his record marks his status as married.

Resources

One of the keys to being a successful lodge secretary is knowing where your resources are and how to use them. Below is a list of common resources:

- Common acronyms
  - EA – Entered Apprentice
  - FC – Fellow Craft
  - MM – Master Mason
  - INSP - Inspector
  - AGL – Assistant Grand Lecturer
  - CMC – California Masonic Code
  - MCYAF – Masonic Center for Youth and Families
- iMember - located on the Member Center under Resources and Publications/iMember Resources
  - "How to" videos
  - iMember Manual
- Intacct Team
  - 415/292-9170; intacct@freemason.org
- List of Lodges Masonic and List of Recognized Grand Lodges
  - Book published by Pantagraph – should be kept at the Tiler's desk
  - List of recognized Grand Lodges is located on the Member Center under Forms/Membership
- Member Services
  - 415/292-9180; memberservices@freemason.org
- Obituary search engine
  - Tributes.com
  - Legacy.com
  - Findagrave.com
- Social Security Death Index
  - geneologybank.com/gbnk/ssdi

Glossary

This glossary is a quick reference in providing definitions and guides in administrative functions of the lodge secretary. Each term displays the relevant California Masonic Code (CMC) section, the page in the iMember manual to assist in entering in the information and a simplified definition. This glossary is not intended to replace all of the resources available to you.

80/120 Rule for Suspensions for Non-Payment of Dues

CMC Section 809.370
iMember manual page

Definition: Any member who has reached the age of 80 or their age plus years as a master mason equal 120 or more can only be suspended for non-payment of dues once the Member Retention Committee has made personal contact with them. If it is determined that assistance is not needed, a report must be received by the Grand Secretary 30 days prior to suspending the member. The form is located on the Member Center under Forms/Membership/Member Retention Committee Report.

Demit

CMC Section 804.130, 804.135, 809.350
iMember manual page 102, 103

Definition: A demit is a request by a mason to end his affiliation with a lodge. The request must be made in writing; an email can be accepted, with his signature attached. Verbal requests or request made by family members may not be accepted.

Dues payments

CMC Section 809.310, 804.740, 804.750
iMember manual page 73-76

Definition: Annual membership dues are due to a lodge by January 1 of the current year; however, a member has a period of 12 months to pay before he becomes eligible for suspension for non-payment of dues. Process payments and issue receipts as they come in.

Elected Representative to Grand Lodge

CMC Section 403.035, 403.075

Definition: An elected representative is chosen by a lodge when neither the master, senior warden nor junior warden is able to attend the annual communication of the Grand Lodge. The elected representative will carry the three votes for the lodge during the sessions.

Life Membership

CMC Section 809.150, 809.320, 809.330
iMember manual page 67-70, 76

Definition: If the lodge has a life membership plan, a member may purchase a life membership which forever exempts him from paying dues to the lodge. No extra funds may be asked for by the lodge to cover per capita or annual expenses.

Officers

CMC Section Chapter 5 beginning with 805.010,
iMember View video directions on Member Center

Definition: Five officers are elected by the lodge every November (Master, Senior Warden, Junior Warden, Treasurer and Secretary) and the remaining 8 are appointed by the Master. Officers need to be entered into iMember for reporting purposes and for access to specific forms on the Member Center and to iMember by the lodge secretary and assistant secretary.

Per Capita

CMC Section 407.025, 809.520

Definition: The amount assessed to each lodge based on all active masons (EA, FC and MM) as of June 30. The lodge will not be charged per capita for member's whose dues have been remitted. The per capita invoice will also include all monies due to Grand Lodge for all applicant fees and contributions during the period 7/1 – 6/30. Members do not pay per capita.

Remissions

CMC Section 809.360
iMember manual page 74

Definition: The act of "forgiving" a member's dues based upon stated criteria in the CMC. Dues can only be remitted for the current year and must be recommended to the lodge by the charity committee and approved by the lodge by vote.

Restorations

CMC Section 809.380, 1404.1000, 1404.1050
iMember manual page 108-109

Definition: The act of restoring a previously suspended (either by non-payment of dues or masonic trial) or expelled member to active status as a Mason.

Suspension for non-payment of dues

CMC Section 809.370
iMember manual page 105-107

Definition: The status of a member who has not paid his dues for a period of 12 months and the lodge has taken the necessary and required actions to declare him suspended for non-payment of dues. The suspension affects his benefits of Masonry in all lodges in which he belongs, including attending meetings and degrees; however, it does not suspend his obligation to pay his dues in all of the lodges in which he belongs. A member can be and should be (if applicable) suspended for non-payment of dues in each lodge he belongs to. If the member is aged 80 or above or his membership plus age make an aggregate of 120, see 80/120 Rule in the glossary for assistance.

Quick Reference Sheets

January

Stated meeting check list:

- ✓ **Current year budget presented and approved by lodge**
- ✓ **Dues remission recommendations presented by Charity Committee (M, SW, JW)**
- ✓ **Take minutes, have December minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Begin working with Treasurer on annual reports to the lodge for February stated meeting**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review February actions**

February

Stated meeting check list:

- ✓ **Annual financial report presented by Treasurer**
- ✓ **Annual investment committee/lodge trustees report**
- ✓ **Annual membership report and monies received presented by Secretary**
- ✓ **Annual financial and status report presented by Hall Association (if applicable)**
- ✓ **Take minutes, have January minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Provide member retention committee list of members who have not paid their dues for current year.**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review March actions**

March

Stated meeting check list:

- ✓ **Take minutes, have February minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Send notices of intent to suspend to members who have not paid previous year's dues**
- ✓ **If not using Intacct, submit annual financial report through the Member Center (March 15)**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review April actions**

April

Stated meeting check list:

- ✓ **Recommend suspensions for non-payment of dues (members with single lodge memberships)**
- ✓ **Take minutes, have March minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Provide retention committee list of members who have not paid current year's dues.**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review May actions**

May

Stated meeting check list:

- ✓ **Announce suspensions (members with multiple lodge memberships) and have the lodge approve**
- ✓ **Take minutes, have April minutes signed after approval by lodge and save the signed copies in the Vault**
- ✓ **Review June actions**

Other duties to perform during the month:

- ✓ **Prepare and submit 990 and 199 tax forms – due May 15**
- ✓ **Review membership roster in preparation for end of Grand Lodge Membership Year (June 30)**
- ✓ **Record any dues payments received in iMember and issue receipt**

June

Stated meeting check list:

- ✓ **Take minutes, have May minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Review membership roster in preparation for end of Grand Lodge Membership Year (June 30)**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review July actions**

July

Stated meeting check list:

- ✓ **Take minutes, have June minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Begin working with Treasurer on semi-annual reports to the lodge for August stated meeting**
- ✓ **Provide retention committee list of members who have not paid current year's dues**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review August actions**

August

Stated meeting check list:

- ✓ **Semi-annual financial report presented by Treasurer**
- ✓ **Semi-annual membership report and monies received presented by Secretary**
- ✓ **Semi-annual financial and status report presented by Hall Association (if applicable)**
- ✓ **Take minutes, have July minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Pay per capita invoice once received.**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review September actions**

September

Stated meeting check list:

- ✓ **If necessary, elect the lodge's elected representative for annual communication**
- ✓ **Take minutes, have August minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Review legislation for upcoming annual communication**
- ✓ **Submit elected representative form (if applicable) for annual communication**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review October actions**

October

Stated meeting check list:

- ✓ **Take minutes, have September minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Send out dues invoices for upcoming year**
- ✓ **Issue dues receipts for upcoming year to life members (if applicable)**
- ✓ **Notice to all members of election of officers at November stated meeting**
- ✓ **Provide retention committee list of members who have not paid current year's dues**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review November actions**

November

Stated meeting check list:

- ✓ **Election of Officers**
- ✓ **Take minutes, have October minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review December actions**

December

Stated meeting check list:

- ✓ **Take minutes, have November minutes signed after approval by lodge and save the signed copies in the Vault**

Other duties to perform during the month:

- ✓ **Installation of officers**
- ✓ **Send out dues reminder notices**
- ✓ **Record any dues payments received in iMember and issue receipt**
- ✓ **Review January actions**