



What is an Inspector?

2025 Inspector Leadership Bootcamp



Presentation Focus

- Job Description
- What an Inspector is Not
- Powers and Prerogatives
- District Officers' Association
- Building a Support Structure
- Resources and Tools
- Misconceptions

Why and Purpose

- Define role of the Inspector
- Confirm expectations
- Confirm understanding of Inspectors' purview
- Outline best Inspector behaviors/attributes
- Reminder – you are not alone!

Job Descriptions / Grand Lodge Opening

- Grand Lecturer
 - To act as custodian of the ritual, and to give such instructions as may be necessary to qualify the Assistant Grand Lecturers and the Inspectors of the several masonic districts and assist them in the discharge of their duties, and to give such instruction to the Lodges and brethren in the lectures and ritual of the Grand Lodge as may from time to time be desirable or necessary. (also 404.250 - no powers)
- Assistant Grand Lecturer
 - To assist the Grand Lecturer in the discharge of his duties, and to perform such other duties as may be required. (also 404.315 - no powers)
- What about the Inspector?

Inspector Job Description

To act as the representative of the Grand Master in the various Masonic districts, instruct and qualify lodge officers in the performance of our ritual, educate lodge officers and members in adherence to our code and in administration of their lodges, *and to perform such other duties as may be required.*

Inspectors are...

The Grand Master's representatives, and...

- Have many duties that shall be exercised
- Have few powers that may be exercised

Inspectors are not...

- “Here to out Master the Master” (-PGM Jeff Wilkins as AGL)
- The uber-Master of the lodges in the various districts
- Responsible for the operations of the lodges in their districts
- The manager/supervisor of any member/officer
- The District Masonic Police
- Higher in rank than any other member
- To take themselves too seriously
- Masonic trial judges

Inspectors should...

- Guide lodges
- Be a mentor
- Praise in public
- Whisper good counsel
- Be appreciative
- Have good use of 24-inch gauge
- Be the #1 cheerleader for lodges
- Be inspirational
- Promote district fellowship and harmony
- Be a ***servant leader***
- Be humble
- Stay informed about what's happening in the fraternity
- Attend Annual Communication
- Plan DSIs well in advance

405.030 – Duties (Shall do...)

- Hold Schools of Instruction
- Require any master to convene his lodge, if necessary
- Cause to be organized a district officer association; request that the master remove an officer for non-attendance
- Appoint/remove officers' coaches
- Issue officer qualification certificates
 - (805.520, 530, 540, 550)
- Issue funeral service certifications
- Report to grand master any failure to qualify in the time required (iMember)
- Visit district lodges as necessary to perform his duties

405.030 – Duties (Shall do... cont.)

- Inspect and correct the work
- Report ritual working condition of each lodge to GL by June 30 (Quarterly reports)
- Report all non-ritual conditions of each lodge to GM by June 30 (Quarterly reports)
- Examine the books and records of each lodge and report any law violations to GM
- Attend inspector and grand lecturer schools
- Attend leadership retreat
- Attend ritual conference

405.060 – Powers (May do...)

Provide dispensations...

- for annual election at a time other than November
- to change the date and/or time of a stated meeting
- to wear Masonic clothing and/or regalia in public processions
- to hold a special meeting at a place other than the lodge building

District Officers' Association and Removal of Officers

- A DOA is used for the purpose of organizing and convening the officers and members of a district for the purpose of instruction
- It does not need to be a legal entity (unincorporated association) unless it is frequently collecting and dispersing funds for events and other purposes
- If an officer of a lodge frequently does not attend the DOA/Sol, the inspector may *request* the removal from his position

Support Structure

- Lodge support
 - Officers' coach: helps lodge succeed, guides rather than directs, doesn't supervise WM, is the canary in the coal mine, your eyes and ears
- Inspector support
 - Attend inspector retreats and build relationships with other inspectors
 - Understand you are not alone and don't have to solve every issue by yourself
 - Someone else has had the exact same issue

Resources and Tools

- Inspector Vault (iMember – more later)
- Inspector's Manual
- Retreats
- Other inspectors
- AGL – your #1 supporter and cheerleader
- District schedule – spreadsheet; shared calendar
- Officers' coaches

Misconceptions

The following are not true:

- ***Representative*** of the grand master means having the *full authority* of the GM
- Inspectors-at-large "outrank" district inspectors
- An inspector's vote/voice is more important than the members of his/a lodge
- Inspectors vote at Grand Lodge
- District Officer Associations must be legal entities and ran as such

Questions?



UP NEXT

Inspector Orientation

2025 Inspector Leadership Bootcamp





Inspector Orientation

2025 Inspector Leadership Bootcamp



Presentation Focus (Agenda)

- iMember
- Forms, Manuals & Guides
- Dispensations
- Entering Qualifications & Awards
- Expense Reports
- Resources
- Other Inspector-Only Vault Items
- Lodge Reports & Review of Books and Records
- Lodge Support
- Inspector Calendar of Duties and Deadlines

Why & Purpose

- Understanding where to find resources in iMember pertinent to your job

Logging into iMember

- Register/Login to iMember
 - https://member.freemason.org/membership_registration

Membership Registration

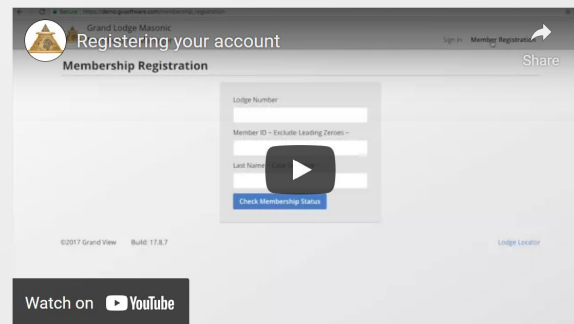
Lodge Number

Member ID ~ Exclude Leading Zeroes ~

Last Name ~ Case Sensitive ~

Check Membership Status

How to register your account



General Reference

Documents and Resources

iMember > Resources > General Reference
Documents and Resources

- California Masonic Code and Edicts
- Proceedings
- 2025 Fraternity Plan
- California Division Map
- Grand Lodge Staff
- The Lodge Manual
- Recognized Foreign Grand Lodges
- Directory of Resources

Forms, Manuals, and Guides

iMember > Resources > Lodge Administration
> Manuals and Guides

- The Lodge Plan
- New Lodge Development Workbook
- Skilled Resources for Lodges
- Consolidation Manual
- Minutes Template
- The Lodge Manual

Dispensations and Forms

iMember > Resources > Lodge Administration
> Lodge Bylaw Administration Information

- Alternate Location – Special Meeting
- Application – Uniformed Service Member
- Special Election of Officers
- Masonic Clothing and Regalia at Public Procession or Parade
- Additional
 - Amend bylaws, et al.

Ritual and Ceremonies

iMember > Resources > Lodge Administration > Ritual and Ceremonies

- Monitor and Officers Manual
- Degree Planning
- Lecture Slides
- Funeral Service Manual
- Award Ceremonies, Receptions, Sign In Sheets
- Other Ceremonies and Events

Entering Qualifications & Awards

iMember > District > Members > [search
Brother's name] > Brother's Profile > History
> Inspector Recorded Events > Add Event

- SD, JW, SW, WM Qualification
- Funeral Master Qualification
- Officers' Coach
- Golden Veteran's Award

Expense Reports (old way)

iMember > Resources > Finance > Grand Lodge
Reimbursement Forms

- Form D – Inspectors
 - Mileage is a big focus
- Include receipts as necessary
 - Ex. Parking (Insp. Retreat, Ritual Conference)
- Submit to AGL (Monthly by 10th, as needed)
- Miscellaneous Expenses – Be specific
 - Attendance at an MW or ST Retreat (AGL approval)
 - Annual Communication
- Choose Reimbursement or Donation

Expense Reports (new way)

SAP Concur Solutions

- <https://www.concursolutions.com>
- Cloud-based expense reporting solution
- Upload receipts as necessary
- Built in mileage calculator
- Enter expenses per month, submit by 10th day of following month
- No clear option choose Donation

Resources

iMember > District > Resources > Inspector General

- Inspector Duties for New Lodges
- Review of Books and Records Guide
- Guide for Supporting Lodges
- School of Instruction Attendance Register
- Inspector's Manual (Sign-in Sheets)
- Qualification Certificate (used in Installation)
- Form D – Inspector Reimbursement
- Expense Monitoring Memo (Guidelines)

Other Inspector-Only Vault Items

iMember > District > File Vault

- Rituals and Ceremonies
 - GL Opening, Constitution, Ritual Floorwork Manual, etc
 - Masonic Funeral (Sacred Roll, teaching materials)
- Training and Resources Materials
 - For Inspectors and Officers Coaches
- Masonic Introductions
- Important Guidelines
- Music for Degrees, Ritual Support Education
- District and Division folders

Ritual Floorwork Manual

- Current available edition is dated 3-19-2023
 - Older versions should be deleted
- Inspectors may use as reference outside of schools of instruction
 - Plan teaching focus
 - Clarify common mistakes
- **Do not use** during schools of instruction

Lodge Reports & Review of Books

iMember > District > Inspector Reports

- Quarterly Reports
 - Due at the end of each quarter
- Review of Books
 - Complete review of prior year after lodge audit and before end of Q2, preferably by end of Q1

Lodge Support

- Who needs Lodge Support?
- Resource for when you or AGL may not have the tactical or strategic experience to assist a lodge – or need an independent third party
- Always keep the AGL informed
- Skilled Resources for Lodges
 - iMember > Resources > Manuals and Guides > Lodge Planning Guides

Inspector Calendar of Duties

- Have a 'checklist' for review of **Lodge & Hall** dates / calendar events
- Pedestal Officer qualifications
- Assist Master, Secretary, and Treasurer, as well as Temple Board, to file information on time (reports, taxes, finances)
- Golden Veteran Award scheduling
- Quarterly Reports and Review of Books

Inspectors' Calendar

January	<p>Complete and submit the Inspectors Quarterly Reports (4th Quarter from last year)</p> <p>Plan and schedule the Review of Lodge Books and Records</p> <p>Ensure that Lodge Officers' and Hall Association Members' names are updated on the Grand Lodge website</p> <p>Ensure that W2 Forms and Form 1099-Misc have been issued to all Lodge and Hall Association employees and independent contractors</p>
February	<p>Plan and schedule the review of Lodge books and records</p> <p>Receive and review the Lodges' Annual Reports (by Lodge Secretary, Treasurer and Trustees)</p>
March	<p>Ensure that IRS (federal) Forms 941 and 940 and Franchise Tax Board (state) Form DE9 quarterly and Form DE9c annually are filed if the Lodge or the Hall Association has any paid employees</p>
April	<p>Complete the review of the books and records for your Lodges</p> <p>Complete and submit the Inspectors Report on reviewing Lodge books and records</p> <p>Complete and submit the Inspectors Quarterly Reports (1st Quarter this year)</p>
May	<p>Ensure that Form 990 and Form 199 are filed (or extension is requested)</p> <p>Ensure that Form 200 is filed (for Hall Association)</p> <p>Ensure that Hall Association Insurance Payment is made</p>
June	<p>Ensure that IRS (federal) Forms 941 and 940 and Franchise Tax Board (state) Form DE9 quarterly and Form DE9c annually are filed if the Lodge or the Hall Association has any paid employees</p>
July	<p>Complete and submit the Inspectors Quarterly Reports (2nd Quarter this year)</p>
August	<p>Ensure that Lodges are paying the Per Capita</p> <p>Plan, discuss and schedule Officers Qualifications</p> <p>Receive and review the Lodges' Semi-Annual Reports (by Lodge Secretary, Treasurer and Trustees)</p>
September	<p>Ensure that IRS (federal) Forms 941 and 940 and Franchise Tax Board (state) Form DE9 quarterly and Form DE9c annually are filed if the Lodge or the Hall Association has any paid employees</p>
October	<p>Complete and submit the Inspectors Quarterly Reports (3rd Quarter this year)</p> <p>Evaluate Officers Coaches' performance and select next year's Officers Coaches</p>
November	<p>Plan for completing Officers Qualifications</p>
December	<p>Ensure that IRS (federal) Forms 941 and 940 and Franchise Tax Board (state) Form DE9 quarterly and Form DE9c annually are filed if the Lodge or the Hall Association has any paid employees</p> <p>Finalize and distribute next year's OSI schedule</p> <p>Determine whether a District Officers Association is needed and plan for it</p>

Questions?



UP NEXT

***Calendars and Communicating
With Your District***

2025 Inspector Leadership Bootcamp





Calendars and Communicating With Your District

2025 Inspector Leadership Bootcamp



Presentation Focus

- District Calendars
- Key Planning Items
- Effective Communications
- Expected Frequency of Schools of Instruction
- Expected Topics and Content
- Misconceptions

Calendars

- Have a common platform for calendar events.
 - Google, Facebook Events, or free CRM
- Share all district calendar events with lodges at Schools of Instruction and in emails (double and triple communication)
 - This promotes fellowship and increases attendance
- Post critical deadlines or benchmarks for lodges and halls
 - Inspector Calendar of Duties

Calendars (cont.)

- Inform district members of special upcoming lodge, district, and Grand Lodge events
 - Golden Veterans, Sweethearts Breakfast, GM or GLO's visiting the area, Past Master's Degree, Youth Orders, Concordant/Appendant Bodies, etc.
- *Always include your contact information!*

District Calendars – Due Date

District calendars that include each School of Instruction – with topics notated – are due to your AGL no later than **December 15th**, sometimes earlier upon request, for the grand lecturer to have them for January 1 to plan his annual schedule.

If you are reading this message, you should already be planning next year's calendar. :-)

Example of District Calendar

905 Masonic District

Today   August 2022 ▼

 Print  Week ** Month**  Agenda ▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	Aug 1	2	3	4	5	6
		6:30pm ORG293 - Stated Meeting	6pm ANA207 - Stated Meeting	6:30pm SOL357 - Stated Meeting 6:30pm YOR469 - Stated Meeting		
7	8	9	10	11	12	13
		6pm ANA207 - District OSI 6pm ORG293 - District OSI 6pm SOL357 - District OSI 6pm YOR469 - District OSI	6pm ANA293 - 3rd Degree Rehe	6pm Exec. Committee & Masonic 6:30pm SOL357 - 1st Degree Re		
14	15	16	17	18	19	20
		6:30pm ORG293 - Double 1st De	6:30pm ANA207 - 3rd Degree	6:30pm SOL357 - Double 1st De		11am ORG293 - Lodge Steak Fry
21	22	23	24	25	26	27
10am ORG293 - Blood Drive		7pm ORG293 - Lodge Is Dark	6:30pm ANA207 - 3rd Degree 7pm YOR469 - Masonic Educatio	6:30pm SOL357 - 2nd Degree	6am YOR469 - Social Hour 🍷🍹	
28	29	30	31	Sep 1	2	3
		7pm ORG293 - Lodge Is Dark	6:30pm ANA207 - TBD	6:30pm SOL357 - Stated Meeting 6:30pm YOR469 - Stated Meeting		

Key Items to Plan

- District/Lodge Schools of Instruction
- Official visits
- Reviews of Books and Records
- District officer installations
- Golden Veteran and Hiram Awards
- Lodge anniversaries
- Qualification dates
- Ritual competition
- District recognition and awards
- Any Grand Lodge events happening in or near the district

Key Reminders to Lodges that Affect Your Duties

- Audit Committee appointment and duties
- Retention Committee appointment and duties
- Charity Committee Duties
- Lodge and building financial administration
- Reports – Annual/Semi-Annual
 - Secretary, Treasurer, Hall Association, Trustees, Lodge Investment Committee

Communication

Utilize common/popular platforms:

- Trestleboards
- Online group communication platform for your district
 - Facebook Page or Group, Band app, GroupMe, Signal, Slack, Trello, FB Messenger, WhatsApp, Skype, etc.)
- Email Service (Mailchimp, Constant Contact, etc.)
- Text messaging
- Engage and interact on social media
 - Facebook, Instagram, Twitter, etc.
- Even pick up the phone and call!

Example of Communication



A Lot To Say...

Hello Brethren. There is a lot of information to convey. To make sure you read it in due time, I will split it up in a few emails.

That being said, this email will have the most time sensitive information to complete today. Please read.

I will also post videos in the District Facebook Group. If you have not joined / Followed that page yet, PLEASE join now. It will make it SO much easier for me and the Master of your lodge, to disseminate information more quickly and easily.

[JOIN / FOLLOW FACEBOOK GROUP >](#)

PS - Always feel free to post in this Group. Share lodge events and fellowship.

District OSI at Orange Grove.

District OSI will be at Orange Grove Lodge next Tuesday (August 9th). Please RSVP ASAP to avoid OMG. 😊

Just answer 3 quick questions, and you're done.

[RSVP FOR DISTRICT OSI, 8/9/22 >](#)

Dinner will begin at 6:00 pm. *Donations are greatly appreciated.*

We will adjourn to the Lodge Room at 7:00 pm.
Topics of education will be:

- Jewel March
- Deacons / Stewards / Marshal
 - Floor-work & rods
- Reading of the minutes (stated meeting), and what's necessary / required.

We should be done within 1 hour. ALL lodge members can attend, so be sure to share this with your Lodge.

I look forward to seeing you there.



Floor-work and Ritual.

Qualifications. It is time to get this started.

Brethren, if you will be an officer next year, refer to the information below. Work with your Officer's Coach this month. DO NOT procrastinate and/or defer this work.

Sr. Deacon - Memorization of the staircase lecture and 2nd section of 3rd degree.

Jr. Warden - Perform (all) 1st degree work, in the East. Complete 1 of the LMCP study guides.

Sr. Warden - Perform (all) 2nd degree work, in the East. Complete 2 of the LMCP study guides.

Master Elect - Perform (all) 3rd degree work, in the East. Complete all of the LMCP study guides.

LMCP stands for **Lodge Management Certification Program**. There are 4 study guides to be completed, based on the information listed above.

Click link below to watch a quick 2-minute video that explains where you can find this information and what needs to be done.

[WATCH 2-MINUTE VIDEO >](#)

** Video also shows where **Candidate Learning Center** can be found.
Share this with your EA, FC, and MM members.*



**Evolve / Grow / Build
Expansion of Awareness**

S.: & F.:
Carlos M Diez Jr / PM
Inspector of the 905th Masonic District
Free and Accepted Masons of the State of California

Follow our >> [Facebook Page](#) for updates and messages.

Keep In Touch - California Masons



Questions?

Resources and Contacts

- iMember
 - If lodge is using it for communication
- Email software for verified communication
 - Free for user lists under 2,000 contacts
- Retreats, online workshops and Annual Communication
- Other inspectors
- AGLs



UP NEXT

Break

WHEN RETURN

*Conducting Your First School of
Instruction and Beyond*

2025 Inspector Leadership Bootcamp





Conducting Your First School of Instruction and Beyond

2025 Inspector Leadership Bootcamp



Presentation Focus

- School of Instruction Formats and Length
- Ritual Support Education and Other Topics
- Attendance and Keeping it Fresh
- Teaching Techniques and Best Practices

Why and Purpose

- Understanding the different types and formats for Schools of Instruction
- Understand frequency, length and mandatory topics
- Improving consistency of Schools of Instructions across the state
- Using ritual support education
- Understanding how to get the job done effectively

Schools of Instruction - Formats

- **Officer School of Instruction**
 - One-on-one with lodge
- **District School of Instruction**
 - All officers of district
- **Inspector School of Instruction**
 - All inspectors (with officers' coaches based on invite and with approval of AGL)
- **Grand Lecturer School of Instruction**
 - All Masons based on degree taught/attained

Frequency of Schools

- Normally looking for six or more per year
- Every district is different

Purposeful Topics

- Two Schools of Instruction covering each degree
 - Consider: first and second half of year and Officers in current vs. advanced stations
 - As needed according to the lodge/district calendars
- Reception of a GLO
- Flag Presentation
- Balloting /Elections
- Installation (include I.O.s)

Schools of Instruction - Subtopics

- Charges
- Marshal's interrogations
- Perambulations
- Second Section of Third Degree
- Deacon / Steward / Rod Work
- Warden work
- Funeral Service

Length of Schools of Instruction

For example purposes only

- 60 Minutes
 - Ritual Exemplification Only with minimal ancillary subjects
- 90 Minutes
 - Lodge/District Admin and Calendars, Ritual Support Education, Ritual Exemplification
- 150 minutes
 - Dinner/Fellowship, Lodge/District Admin and Calendars, Ritual Support Education, Ritual Exemplification

Sharing Calendars at Schools of Instruction

- Have the master or senior officer of each lodge share lodge calendar for the month
 - Stated Meetings, degrees, events, etc.
- Include Grand Lodge and Appendant/Concordant body events
- Include district events, Schools of Instruction, official visits, and reviews
- *Resolve scheduling conflicts*

Ritual Support Education

- History
- Deacons and stewards rods
- Pedestals, columns, and pillars
- Perambulation
- Why do we always turn right?
- Lesser Lights
- Jewel march
- White gloves
- Dueguard
- Landmarks
- Why are lodges blue?
- Tying the apron
- Symbolic center
- Et al.

*To deepen the learning,
understanding, and experience...*

Additional Topics

- Objections to Candidates
- Legislation
- Required reports
- Per capita
- Remits and demits
- Required filings / Submissions to GL
- Leadership retreats
- Secretary's Manual
- The Lodge Manual
- Masonic trials
- Masonic Information Nights

***Create awareness.
Be ready to discuss
these subjects.***

Additional Topics (cont.)

Officers' Coach Training Slides

iMember > District > Vault >
Officer Coach Training Program

- Teaching the Teacher*
- Parliamentary procedure
- Stated Meetings
- Balloting
- Candidate investigation
- Proficiencies
- Degree planning
- Suspensions and restorations
- Visitor investigations
- Installations

Attendance at Schools of Instruction

- Required for officers, others encouraged
- Requesting dispensations for non-attendance
 - Call, text, email
 - Online form
 - *Make it clear what your expectations are*
- Take attendance using ***Inspector's School Attendance Register*** from iMember
- Virtual attendance if topic not esoteric/ritual
 - But remember, if you can't see the work...

Keeping It Fresh

- Invite another Inspector / Inspector-At-Large to conduct School of Instruction
 - Especially if you have a conflict with your own schedule
- Specific district officer positions (ex. all wardens or deacons) / officers' coaches exemplify the work
 - Only if properly prepared to perform the work
- Always include the "Why"

District Recognition and Awards

- Not required, but bolsters pride, participation, and friendly competition
- Master of the Year
- Officer of the Year
- Degree Team of the Year
- School of Instruction Attendance
- Community involvement
- Traveling Gavel Program

Top AGL Teaching Strategies

- Highlight the why behind the ritual
- Correct respectfully
- Plan ahead
- Engage all attendees
- Enlist help
- Make it fun
- Be consistent
- Offer support

Preparation

1. Set goals
2. Attendees
3. Equipment
4. Teaching aides
5. Ritual history
6. Agenda
7. Fellow teachers
8. Feedback
9. Follow up

Physical Work

	Master	Senior Warden	Junior Warden	Senior Deacon	Junior Deacon	Chaplain	Marshall	Stewards
Rod work				X	X			X
Baton work							X	
Bible & Altar work				X				
Flag & GLO								
Opening/ Jewel March	X	X	X	X	X	X	X	X
Candidate Preparations							X	X
Perambulations	X	X	X	X		X		

Teaching / Coaching

- There is no “one way” to teach or coach ritual
- Do not be overbearing or have an “I know everything” attitude
- Make sure you are instructing in a constructive manner
 - Do not criticize publicly
 - Do not embarrass officers / performers
- Learn to recognize the differences between different people and different audiences

Know Your Audience

- One Person
 - Focus on words and the meaning of the part
- Officers of a Single Lodge
 - Focus on floor work
 - Less focus on words
- Officers of a District
 - Wait for natural breaks, then pause for teaching
 - Start/stop format

Best Practices

- Our mantra in leadership development
 - Find right, Re-affirm, Re-direct
- Coach to what is right, not just what is wrong
- Look for innovative ways and opportunities to teach
 - Use of acronyms and helpful reminders
- Understand learning styles
 - Visual, audio, kinesthetic, etc.
- Don't hesitate to ask rhetorical and arbitrary questions

Our Intent

Always communicate your expectations and that we all want lodges to reach the **pinnacle of success!**

Utilize Officers' Coaches

- Have officers' coaches correct and prompt
- Have a School of Instruction for officers' coaches
- Invite officers' coaches to Inspector Schools (with AGL approval)
- Ensure they know they are part of a team
- Use officers' coaches training material

You Made a Mistake or Don't Know?

- You ***WILL*** forget or be unsure
- Being willing to admit you don't know or that you were wrong
- Don't let someone talk you out of what you know is right
- If you are unsure, tell them you'll check and get back to them
- Use the Ritual Guide ("super-secret book")
- Do not allow, "Well, the last Inspector said..." Or "I was taught we do it this way..."

Questions?

Resources and Contacts

iMember > District > Vault >

- Ritual Support Education
- Officers Coach Training Program
- OSI Best Teaching Practices
- Ritual Help



UP NEXT

Officers' Coaches

2025 Inspector Leadership Bootcamp





Officers' Coaches

2025 Inspector Leadership Bootcamp



Presentation Focus

- Where to start?
- CMC, qualifications, duties
- Role and responsibilities
- Characteristics of a good coach
- Styles of coaching and practice
- What creates success?
- Misconceptions

Where to Start?

- Develop a relationship with the current officer's coach
- Selecting a new officer's coach

What Does the CMC Say?

405.030 D – Inspector Duties

Appoint in each lodge within his district an officer's coach, who shall be a qualified past master of a constituent lodge, and who shall serve at the will and pleasure of the inspector.

The officers' coach shall assist in teaching the ritual to the officers of the lodge, and assist in preparing them to qualify for advancement.

Qualifications

- Must be a past master
 - Or the sitting master, as necessary
 - Preferred to be a separate position
- Is not required to be a member of the lodge
- Former inspectors and AGLs can be a great resource
- Good understanding of CMC
- Thorough knowledge of ritual/floorwork

Qualifications (cont.)

- Knows the personalities of the officers and their conflicts
- Have an idea of how to get the best from the officers
- Commitment must be as strong, if not stronger, than the commitment of the officers of the lodge

Duties

- Teach the ritual to lodge officers
- Teach ritual to non-officers
- Prepare officers for qualification for advancement
 - and we should *support their role* in the process
- Attend Inspector Schools of Instruction
 - as permitted by AGL
- Attend Annual Communication, informed on legislation, and ritual clarifications / modifications / updates
- *Advise* in creating successful degree lineups

Role of the Officers' Coach

- The officers' coach represents the inspector on matters of ritual in his assigned lodge. His focus is to develop the **ritual readiness** of his lodge to deliver a **great degree experience** for all.
- He promotes **harmony, trust, and two-way communications** in his relationships with the lodge and the inspector.

From the Inspector's Manual

Responsibility - Even though coaching of an officer may be received from another officer, the officers' coach is responsible for all officer proficiency in the ritual. He shall teach the ritual and lectures as prescribed by the grand lecturer and taught by the inspector.

Characteristics of a Good Coach

- Patient
- Empowering
- Understands the WHY behind ritual
- Unbiased
- Affability
- Articulates well
- Humble
 - Isn't afraid to say, "I don't know, but I'll find out."
- Multi-tasker
- Inspirational
- Patient

Training and Mentoring Officers' Coaches

Have officers' coaches lead Schools of Instruction with you:

- It is the venue to train them
- Give them sections of the School to run
- Ask that only officers' coaches make corrections; help discern the difference between what is important and not
- Hammer out any disagreements between you and the officers' coaches after Instruction
- Give them feedback using officers' coaches development continuum

Styles of Coaching and Practice

- **Readthroughs**

- Sitting down as an officer corps with blue book in hand and reading each part

- **Walkthroughs**

- Stepping through floorwork to solidify the learning

- **Practices**

- Ability to stop and restart as needed

- **Rehearsals**

- Emulating a live degree (prompting only)

What Creates Success

- Allowing officers to collaborate on what is working and not working
- Utilize seasoned brethren to assist the coach in teaching the ritual to non-officers
- Have more than one officers' coaches to help with different duties (ex. lodge admin, lodge culture, leadership development)

What Creates Success (cont.)

- Consider having the lodge evaluate their experience with the officers' coaches or self-evaluations
- Inspire and encourage achievement
- Coach have a great relationship with the master

From Teaching the Teacher

The inspector **should not** be expected to teach the work during his Schools of Instruction. The time for **teaching and learning** degree work is **at the lodge**.

District Schools of Instruction are intended to be opportunities to show how **well prepared** the lodge officers are to perform a degree, and how they **work together** as a team.

The Quietest PM in the Room

The officers' coach may be the hardest working member of the lodge. No other officer is required to keep a focus on the entire ritual in head for the entire duration of the degree – gavel to gavel.

You are the quietest past master in the room. Your responsibility to the support of your officers dictates that you be able to give the correct word at the right time.

It is a thin fence to straddle. While you may wish to give time for your officer to produce the word on his own, you don't want to give the prompt too soon, especially if he is only catching his breath. It is equally important that you don't allow for too long of a delay and leave him "hanging."

Misconceptions

- Is responsible for making/revising/rearranging degree lineups or schedules.
 - He may suggest, but not dictate.
- Lodges appoint officers' coaches
- Inspectors may work with lodges on the best candidate
- Is there to ultimately lead the lodge
- Is authorized to correct across the room during a degree
 - When available, is a great prompter

More Misconceptions

- Officers' coach is the future inspector
 - Is not meant to be campaigning to be the eventual Inspector
- Officers can go directly to the inspector for qualifications
 - Encourage lodges to not circumvent the officers' coach when requesting time to deliver qualification to the inspector

Questions?

Resources and Contacts

- Inspector's Manual
- Officers' Coach Training Guides
 - Inspector Vault



UP NEXT

***Qualifications: Officers and
Lodges***

2025 Inspector Leadership Bootcamp





Officers' Qualifications

2025 Inspector Leadership Bootcamp



Presentation Focus

- Never forget the main goal and purpose of qualifications!
- What are the Official Qualifications per CMC?
- Qualifying for the Chair vs. Installation
- When and where to qualify
- Can Officers break up qualifications?
- Preventing a Lodge from Performing
- Misconceptions
- Critical Thinking Points

What is the main goal and purpose of qualifications?

We want to ensure that Officers are qualified to perform the Ritual well!

Because we want our candidates to experience the best Ritual.

Our candidates are, and should be, the ultimate beneficiary of our Ritual.

Pillar Qualifications

CMC 805.520 - 805.540

All Pillars (MW, SW & JW)

- Third Degree Proficiency
- Proficient in portions of the code that pertain to office (LMCP)

JW: Must complete 1 LMCP course

Member Experience recommended

SW: Must complete 2 LMCP courses

Hall Association recommended (now ex-officio)

WM: Must complete all LMCP courses

***Must complete LMCP courses to be installed.**

Pillar Qualifications

CMC 805.520 - 805.540

- **Master**
 - *Master's* work & lectures (short form EA and MM) in the all three degrees
 - Includes King Solomon and Congratulations in Master Mason Degree
- **Sr. Warden**
 - *Senior Warden's* work in the all three degrees
 - *Master's* work & lecture (Middle Chamber or "G Lecture," not Staircase) in the Fellow Craft Degree
- **Jr. Warden**
 - *Junior Warden's* work in all three degrees
 - *Master's* work and lecture (short form) in the Entered Apprentice Degree

Senior Deacon Qualifications

CMC 805.550

- Senior Deacon's work in all three degrees
- Includes:
 - First and Third Degree Candidate Prayer
 - Staircase Lecture
 - Lead Fellow Craft in Second Section of Master Mason Degree

Qualifying the Chair vs. Installation

Chair

- The Officer is proficient in the ritual requirements of his succeeding station.
- The Officer has successfully demonstrated his work under the observation of the Master and/or Officers' Coach.

Installation

- The Officer has demonstrated in Open Lodge and/or a Degree rehearsal in front of the Inspector that he can deliver the work with excellence and understanding.

Breaking-up Qualifications

- Nothing prohibits breaking-up qualifications into different parts.

Open vs. Obligate vs. Lecture

- Consider your availability and work with Officers to determine the best way to make them successful.

When and Where to Qualify

- Officers' Coach has "signed-off" on the work
- Qualify as early in the year as possible
- Privately
 - But remember, we prefer to see the interaction with the other Officers as a team
- School of Instruction (should be avoided)
- Degree Rehearsal (ideal)
- Live Degree (should be avoided)

Qualifying a Lodge (Our Intent)

A Lodge can work together as a team to deliver an excellent Degree experience.

Delivered from Memory:

- Charges
- Perambulations
- Marshal's Interrogations
- Lectures
 - Full form with slides is great, but not required
- Master's Congratulations

Preventing a Lodge From Performing

Preventing a Lodge from performing a Degree is an emergency power for the Inspector and should be used with *extreme* caution.

Will there be bad degrees? Of course. However, if the performance and experience (specially for the candidates) of the Degree begins to suffer time and time again, the Inspector may halt future Degrees until the work has been corrected.

Misconceptions

- Must qualify for all previous positions
 - Ex. Pillars do not need to qualify as Sr. Deacon, etc.
- Must serve as a lower ranking officer to qualify for subsequent office
 - Pillars do not need to serve as SD or Warden prior to succeeding positions
- Sr. Deacon must have 3rd Degree Proficiency
- Must qualify in a live degree/open lodge or gavel-to-gavel
 - In fact, preferred that they do not do this
- Officers' Coach may certify qualifications

Critical Thinking

- Can an Inspector qualify an Officer for Installation, but not for participation in Degrees?
- Should an Inspector qualify an Officer who is repeating his position?
- Should an Inspector still qualify an Officer who has been qualified by the Inspector's predecessor?
- Why do Brothers procrastinate and delay the qualifications?

Questions?

Resources and Contacts

- Ritual Qualification Chart
- CMC 805.520 - 805.550



UP NEXT

Official Visit vs. Visitations

2025 Inspector Leadership Bootcamp





Official Visit vs. Visitations

2025 Inspector Leadership Bootcamp



Presentation Focus

- When to have an official visit
- What is happening during an official visit?
- Why have an official visit?
- Official visit talking points
- Visitations (unofficial)
- Misconceptions

When to have an Official Visit

- First quarter is preferred – any time other than degree conferral
- Work with lodge masters to determine a time considerate of their schedule
- Prepare remarks, if desired
- Notes:
 - Visiting during annual reports / business may give you further insight into the lodge
 - Remember: not every lodge meets monthly anymore
 - Attire: Determined by lodge custom

What Happens During a Visit?

- Inspector is "received" as if he was, and on behalf of, the grand master
- Received with Grand Honors
- Just like the grand master, the inspector is the last person to speak in the meeting
 - The master should not ask for further comments or announcements

Why have an Official Visit?

In the event a grand lodge officer/grand master visits one of our district lodges, we would like our lodges to be prepared for that situation.

We want to observe how a lodge operates under those circumstances.

Official Visit Talking Points

- Grand Lodge program
- Grand Master's theme
- Grand Lodge initiatives
- Fraternity Plan
- Jr. Grand Warden Recommendee bio and/or personal experience
- Be inspirational and supportive

Visitations (Unofficial)

- To observe how the brethren work together both in business meetings and degree work
- Inspect the work and correct the same
 - Preferably through officers' coaches
- To qualify officers for advancement
 - Degrees or rehearsals
- To support lodge recognition and awards
- Ensure that you are perceived as friendly, a cheerleader and support mechanism
 - Not perceived as the district police

Misconceptions

- Inspectors must attend every meeting of every lodge in their district
- Official visit must be on a stated meeting night
 - May be any meeting other than a degree
- Official visit attire must be a tuxedo
 - Per lodge custom

Questions?

Resources and Contacts

- Monitor and Officers' Manual
- Inspector's Manual



UP NEXT

***Lodge Support for New
Inspectors***

2025 Inspector Leadership Bootcamp





Lodge Support for New Inspectors

2025 Inspector Leadership Bootcamp



Presentation Focus

- Support resources
- Different types of tactical support
- Resources for diagnosing issues
- Requiring a master to convene
- Misconceptions

Support Resources

- Past masters of the lodge
- Fellow inspectors
- Inspectors-at-large
- AGL (never hesitate to contact them)
- Member / Financial / Real Estate Services
- Leadership Development / Lodge Support Committee

Note: There may exist a conflict of interest or bias if you, a fellow inspector, or the AGL is a member of one of your lodges.

Tactical Support Areas

- Conflict resolution
- Long-term planning
- Financial / accounting
- Leadership development
- Cultural diversity and integration
- Understanding Masonic education

Conflict Resolution

- When is it appropriate?
- Requirements for conflict resolution
 - Emotional component – relationship
 - Dispute **CANNOT** surround an ideological belief
 - A **genuine desire** to fully resolve the issue
- As opposed to other conflict styles:
 - Negotiation, withdrawing, competing, accommodating, compromising, collaborating, adjudication

Long Term Planning

- Does the lodge have a vision and/or mission statement?
- Is the lodge reinventing the wheel every year?
 - Do they have a lodge handbook?
- Does the lodge have a 5-year strategic plan?
- Does the hall association have a maintenance plan?

Financial / Accounting

- When asked, can elected officers answer simple financial questions?
- Does a lodge seem to have money/cashflow, but is always broke?
- Are a lot of rentals occurring, but lodge is not receiving dividends?
- Are they using Intacct?
- Are transactions entered in Intacct and tax returns filed on time?

Leadership Development

- Are officers attending the Leadership Retreats?
- Is developing future leaders a priority?
 - Are junior officers given opportunities to lead and take on meaningful responsibility?
 - Does the Executive Committee discuss the "up-and-comers" in the lodge?

Cultural Diversity

- Do the active lodge members reflect the local community?
- Do the lodge officers reflect the membership?
- Are there factions that exist within the lodge?
- Is any sort of discrimination occurring?
 - Ageism, racism/racial bias, religious, political, sexual orientation

Understanding Masonic Education

- The lodge says it wants Masonic education but struggles to understand the different areas and what will have the greatest impact on their membership. A few brothers want something different than the rest of the lodge.
 - Symbolic (What does this symbol mean to you?)
 - Historic (historical accounts)
 - Romantic (Freemasons are the modern Templars)
 - Esoteric (corollaries with various mystery schools)
 - Academic (research papers)
 - Leadership development
 - Self-Improvement
 - Community building

Resources for Diagnosing Issues

- Lodge Health Check
- Long Term Planning Guide
- Lodge Audit
- Review of Books and Records
- Officers' coach
- Sometimes just a conversation or a visit to a lodge can assist in diagnosing issues

Requiring a Master to Convene

- Unresolved cultural conflict and/or discrimination
 - Ex. Arbitrary blackballing
- Compliance issues
 - Ex. Financial / Administrative
- Attendance at School of Instruction / Ritual issues
- Getting a lodge's attention

Requiring a master to convene his lodge is an *emergency power* for the Inspector and should be used with *extreme caution*. However, if there exist systemic issues that seem to be unable to be remedied without intervention, the Inspector may require the master to convene to address the issues.

Misconceptions

- A lodge that needs external support is on its last legs
 - All lodges need varying degrees of support
- A lodge must solve all its problems alone and internally
- A lodge must wait a long time before reaching out for help

Questions?

Resources and Contacts

- Lodge Health Check
- Long Term Planning Guide
- Lodge Audit
- Review of Books and Records
- Member / Financial / Real Estate Services
- Gary Silverman
- Mark Nielsen



UP NEXT

***Review of Books and Records
(Not an Audit)***

2025 Inspector Leadership Bootcamp





Review of Books and Records (Not an Audit)

2025 Inspector Leadership Bootcamp



Presentation Focus

- Who's involved
- What's reviewed
- Why (What to look for)
- Where/How (In-person vs. online)
- When (Time of year)
- Using the checklist
- Misconceptions

Why and Purpose

- Understand the process
- Share best practices
- Learn how to get the best value for the time spent
- Understand how to provide feedback and get commitment necessary to address issues

Where to Begin?

- Pick review date along with yearly scheduling
- Pick a date far enough in advance so that all can plan accordingly
- Share review checklist with attendees in advance of the meeting – this isn't intended to be a pop quiz
- Attendees: WM, secretary, treasurer, hall association directors (any others that are interested, wardens recommended)

What to Review / Look for

- Lodge Minutes
 - Minutes are attested to in a timely manner
- Dues
 - Dues (payments, remissions, Charity Committee, SNPDs)
- Grand Lodge Reports
 - Completed and delivered at stated meeting and noted in minutes
- Lodge / Hall Audits
 - if available, but they should be - if not, why not?

What to Review / Look for (cont.)

- Lodge by-laws
 - Is an up-to-date copy of by-laws accessible?
 - If no recent changes, do they have access to their bylaw book?
- Candidate proficiency records
 - Entered in member profile and noted in minutes
- Committee appointments
 - Audit and Membership Retention Committee
- State/Federal tax return submission
 - Available in the Lodge Vault?
 - Tax exempt status maintained?

What to Review / Look for (cont.)

- Employment reporting (if applicable)
 - Employee records up to date and quarterly filings are on time
- Hall Association information
 - Bylaws and Articles of Incorporation on file
 - Tax exempt status maintained

Conducting the Review

- In person or virtual, but in person might be more informative or easier to communicate
- Provide immediate feedback on any good work as well as any areas for improvement
- Make it fun – coffee/donuts, breakfast burritos, pizza, etc. (Fellowship!)

Conducting the Review (cont.)

- Be aware of any responses that appear to be evasive
- Reinforce importance of reviews – ensure everyone adheres to CMC and maintains non-profit status
- Ask about questions or concerns of those present

Post-Review

- Share good and bad feedback with all attendees
- Create a corrective action plan
 - Include a due date, as necessary
- Share concerns with AGL
- Enter results of review in iMember
 - iMember > District > Inspector Reports > Review of Books and Records

When

- Schedule the review at a time when the lodge audit and reports will be complete
- Normally end of first quarter or beginning of second quarter
- Remember: Not all lodges meet monthly anymore
- Ensure information is being provided in a timely fashion

Misconceptions

- The Review of Books and Records is an audit
 - **NOT AN AUDIT**
 - It is a **REVIEW** of proceedings and operations
 - We are there to observe, report, make recommendations as necessary, teach proper operations, and help develop and approve a corrective action plan, if necessary
 - We are not there to condemn, belittle, or tell them how we did it in our year

Misconceptions (cont.)

- Review needs to be done in one day
 - It can take as long as necessary
- Review of Books and Records must be done in conjunction with the official visit
 - Should NOT coincide with a meeting

Questions?

Resources and Contacts

- Inspector's Manual
- Review of Books and Records Checklist



UP NEXT

Capstone / Recap

2025 Inspector Leadership Bootcamp





Capstone / Recap

2025 Inspector Leadership Bootcamp



Presentation Focus

- Communicating your expectations
- Summarizing and dealing with misconceptions
- Communications
- Qualifications
- What an inspector is not
- What an inspector is
- Upcoming virtual sessions

Communicating Your Expectations

- Don't give lodges and officers a vague or moving target
- Communicate what success looks like
- Instill in them that we desire them all to achieve the pinnacle of success

Summarizing/Dealing with Misconceptions

- Previous inspector overreach and underreach are real – be ready to field questions, comments, and feelings
- Our brothers are great at creating their own narrative when they don't understand or don't know something – find right, re affirm, re direct

What are some things you learned during Bootcamp that provided clarification on some popular misconceptions?

Communications

- Over-communication really isn't a thing
- Helpful reminders to lodges will assist them in being able to focus on Masonry – and make your job easier
- Consistent communication lets them know you are there for them and are willing to support them in whatever they need

Qualifications

- Motivate to qualify early and be always looking ahead
- Observe the team of the lodge at work
- Did they perform and deliver to the best of their ability?

What an Inspector is Not

- District Masonic Police
- Constantly looking for violations

An Inspector is...

- A cheerleader
- A trailblazer
- A motivator
- Inspirational
- Someone who could be emulated
- Someone you love to have present in your lodge
- Your greatest friend and biggest asset in running a successful lodge

Questions?

Upcoming Virtual Sessions

- Hall Associations
- GL Event Protocol: Installations, Awards, and Grand Lodge Events - Oh My!
- Certifying Funeral Masters
- How to Help Avoid Masonic Trials
- Advanced Communication Techniques

Debrief

- How was this experience?
- What was something you learned or a misconception that was cleared-up?
- What is an action that you are now going to take?



UP NEXT

Main Retreat

2025 Inspector Leadership Bootcamp

