

BREAKOUT 1 | ADMINISTRATION TRACK

Understanding the Role of **the Secretaries** *(and their assistants)* in the Beehive of the Lodge



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2026 Lodge Leadership Retreat

The Beehive of the Lodge

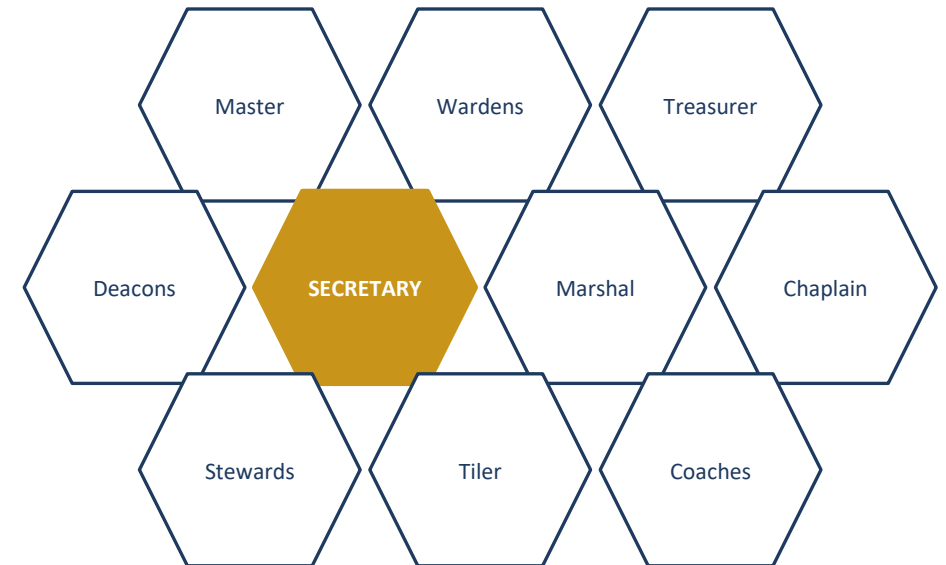
Every role serves the hive — and the hive serves every role.

Why the metaphor matters

The beehive is one of our oldest Masonic emblems — the symbol of industry. The hive thrives only when each bee knows its work and trusts the others to do theirs.

The Master sets direction. The Wardens carry the work forward. The Treasurer guards what is gathered.

The Secretary is the keeper of the hive's memory and rhythms — the records, the correspondence, the calendar, the institutional voice.



You sit at the center of how the hive remembers, communicates, and reports.

Who You Are

The Code defines the role in one sentence — read it carefully.

“The Secretary is the principal administrative and recordkeeping officer of the Lodge.”

California Masonic Code §805.230



Principal

Not assistant, not optional. The Lodge's chief administrator.



Administrative

Operations, processes, communication, follow-through, deadlines.



Recordkeeping

Memory of the Lodge — minutes, members, money, correspondence.

Every duty in §805.230 traces back to those three words.

Where Your Duties Are Written

Four sources — and they reinforce each other.

1

California Masonic Code

§805.230 lists the duties in eight lettered groups (A–H). Other sections in Part 8 add more — see §813.040(B).

2

The Ritual

“To observe the will and pleasure of the Worshipful Master, and to record the proceedings of the Lodge.”

3

Customs of the Lodge

Every Lodge has practices not in the Code — installation forms, dues mailings, special observances. Honor them; document them.

4

Organizational Good Sense

Backups, security, accessibility. The Code sets the floor; good practice rises above it.

The Eight Cells of the Secretary's Hive

§805.230 organizes your duties into eight groups. We'll walk through each.





Recordkeeping & Documentation

The minutes, the books, the seal — your most visible work.

What the Code requires

- Record proceedings of every meeting under the Master's direction; produce minutes.
- Read or distribute electronically (with a standing resolution, ≥72 hrs in advance).
- Get minutes approved at a Stated Meeting; present to the Master for signature.
- Maintain Bylaws book — every member signs in ink, in order of admission.
- Maintain the Tiler's register — visiting Masons sign in ink.
- Hold the Charter, dispensations, the seal, and degree/affiliation applications.

In practice

- Take notes during the meeting; don't try to remember it later.
- Use a standard minutes template — same structure every month.
- After approval, no edits except by motion properly recorded.
- Records over five years old may be kept in permanent electronic form; originals can then be discarded.
- Back up everything. A single laptop is not a recordkeeping system.
- Walk new members to the Bylaws book on the night they're raised.



Membership Management

The roster behind every other duty.

What the Code requires

- Maintain a record for each Mason: full name, age and occupation at admission, degree dates, affiliation dates.
- Track every change in membership status.
- Notify Grand Lodge promptly via the prescribed reporting system of:
 - initiations, affiliations, rejections, demits,
 - suspensions, expulsions, restorations, deaths.

In practice

- iMember IS your member record system — keep it current.
- When something changes, report it the same week, not next quarter.
- Verify contact info at every petition, every degree, every dues mailing.
- When a member dies, notify Grand Lodge promptly — survivors and obituaries depend on it.
- Run a status audit twice a year; cross-check iMember against your roster.



Communications & Notifications

You are the Lodge's voice between meetings.

What the Code requires

- Issue notices and summonses as required by the Master or this Code.
- Communicate official actions and correspondence between the Lodge and Grand Lodge.
- Notify candidates of election or rejection; provide information on scheduled degrees.

In practice

- Trestleboard, email, app, social, mail, phone — match the medium to the audience.
- Don't only talk to active members. Widows, sojourning Masons, and inactive brethren matter too.
- Forward Grand Lodge notices fast — don't sit on them.
- Track everything you send. If a candidate says he wasn't told, you should be able to show what was sent and when.
- When in doubt, summons in writing.



Financial Responsibilities

You are not the Treasurer — and that's exactly why this matters.

What the Code requires

- Receive all funds payable to the Lodge.
- Promptly: pay the funds to the Treasurer in exchange for a receipt; OR deposit to the Lodge's designated financial account for review by the Treasurer and filing in the Lodge's records.
- Maintain accurate records of all financial transactions.

In practice

- Two-person control: receive ≠ deposit ≠ approve. Never collapse roles.
- Issue/receive a written receipt for every transfer to the Treasurer.
- Approved expenditures belong in the minutes — not just the bank record.
- Match dues, donations, and event revenue to who paid; don't let cash sit unallocated.
- Reconcile against iMember and the bank monthly with the Treasurer.



Reports & Compliance

Two annual moments — and a steady stream of returns to the Grand Secretary.

What the Code requires

- August Stated Meeting — present a membership report for the six months ending the preceding June 30.
- February Stated Meeting — present a membership report for the preceding calendar year.
- Submit all other required reports, certifications, and returns to the Grand Secretary in accordance with Grand Lodge procedures and timelines.

In practice

- Put August and February on the calendar today.
- Pull the membership report straight from iMember — don't reconstruct it by hand.
- Read the report into the minutes; file the underlying data with your records.
- When Grand Secretary requests something, treat it as a deadline, not a suggestion.
- If you can't meet a deadline, communicate early — don't go silent.



Reporting Systems & Tools

Use what Grand Lodge provides — and secure what you keep.

What the Code requires

- Use Grand Lodge–designated tools and systems for membership, finances, reporting, and file storage.
- Use other Grand Lodge tools for communication and Lodge operations as needed.
- Maintain the security of records. After 5 years, records may be copied to permanent retrievable electronic form; originals may then be discarded.

In practice

- iMember and the Member Center are not optional — they ARE the systems.
- Don't keep a parallel "shadow" spreadsheet that disagrees with iMember.
- Use unique, strong credentials. Never share logins between officers.
- Plan for handoff: every system your successor needs, with a clean way to get access.
- We'll dive into what's new in iMember in Breakout 4 (Maribel) and Modern Tools Sunday morning.



Officer & Committee Support

You make everyone else's job possible.

What the Code requires

- Assist the Master and other Lodge officers — administrative support and access to records.
- Support committees by maintaining their records and preparing required documentation.

In practice

- Send the Master an agenda and the prior minutes 72 hours before each Stated Meeting.
- Brief incoming officers on calendar, deadlines, and pending items.
- Maintain a committee chair list — names, charges, and current status.
- Keep a shared calendar of installations, degree dates, and Grand Lodge deadlines.
- When an officer asks where something is, your answer should be "I'll get it to you today," not "somewhere in the file room."



Additional Functions & Duties

Everything else — including the most underrated duty: a clean handoff.

What the Code requires

- Provide administrative support for installations, funeral services, public events, and other ceremonial functions.
- Facilitate a smooth transition of all records to a successor Secretary at the end of your term.
- Perform other duties as the Bylaws or this Code require, or the Lodge directs.

In practice

- Build an installation packet template you reuse every year.
- Maintain a funeral protocol file — who to call, what's said, what's recorded.
- Start your handoff document the day you take office, not the month you leave.
- Keep a "how this Lodge actually works" doc — passwords, vendor contacts, traditions.
- Compensation for the Secretary is whatever the Lodge directs.



The Assistant Secretary

The single highest-leverage decision a Secretary makes.

Why appoint one

- The work is too much for one person done well.
- Continuity — if you're sick, hurt, or traveling, the Lodge keeps moving.
- Succession — your Assistant is your most likely next Secretary.
- The title "and their assistants" is in the agenda for a reason.

What they can do

- Take meeting notes; draft minutes for your review.
- Run the iMember updates you sign off on.
- Manage the Tiler's register and visitor records.
- Handle routine member correspondence on your behalf.
- Cover degree-night logistics so you can be present.

How to set them up

- Define the role in writing — what's theirs, what's yours.
- Give them real access (within Lodge security policy).
- Meet weekly for 30 minutes; review what's open.
- Let them speak in committee meetings on Lodge business.
- Plan their year-end transition into the Secretary's chair.



Getting Up to Speed

A working plan for your first 90 days — or your next 90.

1

First 30 Days

Orient

- Read §805.230 and §813.040(B) cover to cover.
- Get login access to iMember and the Member Center.
- Sit with the outgoing Secretary; collect every system, password, and file.
- Inventory your records: minutes, Bylaws book, Tiler's register, charter.
- Introduce yourself to the Inspector and the Grand Secretary's office.

2

First 60 Days

Establish rhythms

- Set a weekly "Secretary work" block on your calendar — protect it.
- Build templates: minutes, dues notice, summons, member welcome.
- Confirm August / February membership report dates on the calendar.
- Start the handoff document for whoever follows you.
- Identify and name an Assistant Secretary if you don't have one.

3

First 90 Days

Sustain & improve

- Run a roster audit — iMember vs. your records.
- Reconcile finances with the Treasurer; lock in the monthly cadence.
- Propose a standing resolution for electronic minutes distribution if your Lodge doesn't have one.
- Review the 5-year archive — digitize what should be digitized.
- Ask the Master what HE needs from you that he isn't getting.

Where We Go From Here This Weekend

Today is foundation. The rest of the track goes deeper.

When	Session	Presenter	Connects to today
Sat 11:20	Welcoming New Members	Michael Roberts	<i>Pairs with B (Membership) and C (Communications)</i>
Sat 1:55	Strengthening the Craft: Retention & Engagement	Michael Roberts <i>cross listed with Membership track</i>	<i>Pairs with B (Membership)</i>
Sat 2:55	What's New in iMember	Maribel Pasamic <i>cross listed with Finance track</i>	<i>Pairs with F (Reporting Systems)</i>
Sun 8:30	Modern Tools for Lodge Management	Jordan Yelinek	<i>Pairs with F (Reporting Systems)</i>

Plus the Learning Lab: short hands-on sessions on bills, financial reporting, suspensions, applications, online payments, newsletters, and more.



Questions & Where to Get Help

Member Services

Your first call when you're stuck on iMember, reporting, dues, or anything in §805.230.

Email memberservices@freemason.org

Phone (415) 292-9180

Member Center member.freemason.org

What's your hardest duty right now?

Let's spend the rest of our time on the ones you brought into the room.