

SUBORDINATE LODGE SECRETARY'S WORKSHOP 2006

Prepared by

Brother M. Trent Carmon, Right Worshipful Grand Secretary

The Lodge Secretary is a business officer of the Lodge. His major responsibilities are:

- 1. Record Keeping**
- 2. Correspondence**
- 3. Financial Agent**
- 4. Reports to Grand Lodge**
- 5. Maintenance of Records**

RECORD KEEPING:

A. Keep minutes of all lodge proceedings and transfer minutes to a permanent record book

B. Maintain a file of each individual member to include the following information:

- Name**
- Mailing Address/ E-Mail**
- Phone Number**
- Birth date**
- Eligibility for Benevolence**
- Date raised, reinstated, restored and/or demitted in**
- Dropped, demitted out, expulsion or suspended date**
- Beneficiary name, address and relationship**
- Dues payment and other financial obligations**

CORRESPONDENCE:

A. Receive and read all communications addressed to the lodge and read in open meeting after approval of the Worshipful Master.

B. Send notices for special or called meetings or other events of the Lodge as requested by the Worshipful Master.

C. Corresponds with other Masonic bodies, community groups and individuals as necessary for the work of the Lodge.

D. Sign and affix the Lodge seal to all official documents as required.

E. Guardian and custodian of the Lodge seal

FINANCIAL AGENT:

The Secretary Should be Bonded by the Subordinate Lodge

A. Collect all monies due the Lodge and give a receipt for monies collected.

B. Maintain a record of all receipts and the explanation for which they were paid.

C. Report all monies collected to the treasurer getting a receipt from the treasurer for the amount transferred.

D. Prepare and sign vouchers along with the Worshipful Master for all funds to be paid out.

E. Convey Book to the Audit Committee as requested.

REPORTS TO THE GRAND LODGE:

A. Prepare and submit Annual Report and Supplemental Reports to the Grand Lodge in a timely manner. Make sure reports are complete and proper fees and assessments are included with the report.

- **Attach original copy of Membership Applications, Demit forms and/or Reinstatement forms to the report(s). Review forms to assure that all portions are filled out with the correct information.**

******* Any report sent without proper payment will be returned.**

- **A copy of the report should be kept for the lodge files**
- **A copy of the report should be forwarded to the District Deputy Grand Master**

B. Use only updated copies of all forms.

C. Forms

- **Annual Report**
- **Supplementary Report to Annual Report**
- **Application for Membership**
- **Report of Investigating Committee**
- **Demit**
- **Reinstatement**
- **Request for Dispensation**
- **Death Claim Form**
- **Request for Supplies**
- **Beneficiary Change**

MAINTENANCE OF RECORDS

A. Copies of Documents that should be easily accessible:

- **Grand Lodge Bylaws**
- **Subordinate Lodge Bylaws**
- **Grand Lodge Proclamations**
- **Proceedings of Grand Lodge Sessions**
- **Annual Reports**
- **Supplemental Reports**
- **Applications for Membership**
- **Reinstatement Applications**

- **Demit Requests**
- **Minutes of Past Lodge Meetings**
- **Contracts and Agreements**
- **Record of any Legal Transactions**
- **Past Financial Reports/Records**
- **Insurance and Bonding Documents**

*******Points of emphasis: *******

Complete address = street name & number; apartment number; city; state; zip code.

Worshipful Master's address for year beginning July 1, 2006

Complete portion for Elected and appointed officers for 2006-2007 year

Line by line explanation of preparation of Annual Report/Supplementary Report

- **\$50.00 assessment must be paid by all members joining, those demitting from out of state and any member reinstating who was dropped before 2002 or has not previously paid the \$50.00.**

Application & reinstatement forms: date of action (extremely important)

Timeliness of reporting

Briefing regarding Form 990 per Memorandum from William A. Marsh, Jr.

Use ELGIBLE MEMBERSHIP number on pg.1 of Annual Report Receipt sent to you for your beginning membership for 2006 report. If number is incorrect use correct number on report. Please include and listing of total membership.

