



MANUAL FOR  
OFFICERS

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# MANUAL FOR OFFICERS

## OF SUBORDINATE BODIES ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY

Revised in 2020 by the  
State of the Rite / Strategic Planning Committee

This book is the property of THE SUPREME COUNCIL OF SOVEREIGN GRAND INSPECTORS GENERAL OF THE THIRTY-THIRD AND LAST DEGREE OF THE ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE NORTHERN MASONIC JURISDICTION OF THE UNITED STATES OF AMERICA.

When no longer needed by an Officer of a Body, it must be returned to the Valley Secretary.

If the holder loses possession by death or otherwise, the finder will please return to:

**THE GRAND SECRETARY GENERAL**  
Supreme Council 33°  
33 Marrett Road  
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Lexington, MA 02420-0519

**2020**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Valley of \_\_\_\_\_

State of \_\_\_\_\_

Supreme Council, 33°  
Northern Masonic Jurisdiction  
United States of America

## **Welcome to Scottish Rite, NMJ Leadership**

You are now a member of one of the most important teams in all of Scottish Rite, Northern Masonic Jurisdiction. You have been elected, or appointed, as an officer and leader of your Valley. This Manual for Officers is an excellent source of information for anyone serving in an official capacity in the Scottish Rite. It must not be used as a substitute for the Supreme Council Constitutions, which should be read and studied by all officers. It will, however, provide easy references as you fulfill your duties with in your Valley.

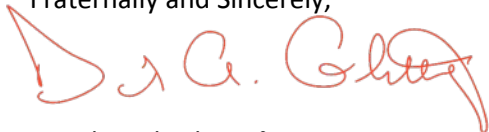
Within the pages of this manual you will find historic notes on the background of Scottish Rite, suggestions concerning the exemplification of degrees, details of protocol in ceremonial etiquette and in administrative procedures, and helpful hints to make your Valley run smoothly.

To lead effectively you must be well informed. This guide will help you to understand the orderly procedures that will make your tenure as a presiding officer successful. Your members look to you for leadership. Take advantage of all the tools available to you. Your success as a leader will not only be more beneficial to the membership but will also be more rewarding for you.

You have many dedicated officers that have come before you and that will come after you that are willing to assist. Additionally, there are numerous other leaders in the Scottish Rite, NMJ that are here to help.

Lastly, the Supreme Council staff physically located in Lexington, MA are here for YOU and your collective success. There is no doubt, it takes a village to support our Valleys and all Scottish Rite, NMJ members. It is our hope that you have everything you need to be successful.

Fraternally and Sincerely,



David A. Glattly, 33°

Sovereign Grand Commander

Ancient Accepted Scottish Rite of Freemasonry, Northern Masonic Jurisdiction USA

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# I. MEMBERSHIP DEVELOPMENT PROGRAM

## INTRODUCTION

The lifeblood of all Masonic organizations, including the Scottish Rite, is its membership. To remain a vital, influential and respected organization, it is imperative that we attract new members who are Brothers interested in further Masonic light and expanding their circle of fraternity. A comprehensive membership development program works.

**Every officer, elected and appointed, is on the Membership Team. This is not negotiable.** No matter how well conceived and defined, no program will succeed without the backing and commitment of Valley officers. The officers must provide the leadership to assure a successful development and implementation effort. They must also provide on-going direction and support to achieve the ultimate goal of increasing our membership. The degree of success will generally be dependent upon the level of support provided by the Valley officers as a unit.

**Our efforts must include non-Masons as well as our traditional source of members, the Symbolic Lodge.** On every occasion possible, non-Masons and Symbolic Lodge members (who are not members of the Scottish Rite) should be invited to attend social functions, fraternal relations dinners, and other events where we can introduce them to Freemasonry and the Scottish Rite. At every open program, officers should bring guests and should encourage other members to do the same. Valleys should consider at least one open program each year. The health of our Blue Lodges is the health of the Rite.

**Officers should give enthusiastic support to Grand Lodge membership programs.** Since the main source for new members is the Symbolic Lodge, that is where primary efforts must be directed. It is important to cultivate and maintain good fraternal relations with the Grand Lodge as their support for membership development efforts is not only beneficial, but essential to the ultimate success of the program.

The Membership Development Team constituents, duties and observations outlined in this section is a guideline based on best practices that incorporates the major elements essential to developing an effective membership development program. This recognizes that not all Valleys are the same and, therefore, individual plans may need to be tailored to meet local needs.

There are, however, four important elements that must be included in every plan:

- 1) a detailed plan for the recruitment of new members;
- 2) a detailed plan for the retention of existing members;
- 3) an action plan for developing closer fraternal relations with Symbolic Lodges in the geographical vicinity of the Valley and
- 4) application and accountability.

## **THE TEAM AND RESPONSIBILITIES**

### **VALLEY EXECUTIVE COMMITTEE, BOARD OF TRUSTEES & PRESIDING OFFICERS**

All members of these groups are on the Membership Team. This is also non-negotiable. The Executive Committee or Board of Trustees and Elected and Appointed Officers (hereafter called the "Committee"), have **THE** fundamental responsibility for ensuring that an effective Membership Development Program (hereafter called the "Program") is developed, implemented and maintained.

- Lead by example in personally recruiting new members.
- Work in conjunction with Supreme Council elected and appointed officers in your valley and Supreme Council staff dedicated to Membership Development.
- Establish strategies for outreach, communication of Scottish Rite opportunities and benefits of membership, including method and strategy to suggest membership that work for your valley.
- Give direction to Membership Team on how to implement strategy and goals.
- Provide continuing support to Officers and Membership Team participants
- Develop an Ambassador Program where there is a Scottish Rite Member who serves as a Scottish Rite Ambassador in each Blue Lodge as a liaison and herald for the Valley.
- Dedicate a specific member of the Membership Team to monitor progress of efforts
- Establish accountability for particular assigned strategic tasks. Identify a Chairman and an Assistant Chairman. Identify specific individuals to be leaders of particular work groups dedicated to particular strategic functions. Hold every team member individually responsible to develop and maintain the valleys active relationship with the Blue Lodges from which its membership is developed.

### **MEMBERSHIP DEVELOPMENT CHAIRMAN**

Assign responsibilities & monitor progress

- Provide progress reports to Executive Committee
- Recognize and reward exemplary team members at the county, district and/or Symbolic Lodge level

The Chairman has responsibility for the development and implementation of the Program in accordance with the policies, procedures and guidelines approved by the Committee. He also has overall administrative and operational control over the Program once it is introduced. The Chairman should be expected to serve at least three years. He should possess proven leadership skills and experience as this position is a critical service to the Valley.

He should lead by example in personal recruitment efforts. His regular attendance at monthly Executive Committee/Trustee Meetings, Stated Meetings and Planning Committee meetings are fundamentally necessary. This will afford him an opportunity to update the committees on membership development activities. This will also give him an opportunity to provide input on planned family picnics, parties, and events that might prove interesting to a prospective member and his family.

**(1) Critical Program Development Activities and Perspectives:**

- Maintain regular contact with Supreme Council Director of Membership Development for up to date information and emerging strategies and tools that will help in his work.
- Lead the development with the input of the team of a strategic plan for membership development that will apply to the valley:
- Define objectives, decide how to reach those objectives, establish accountability for implementation, set goals, pull the trigger and maintain momentum.
- Efforts must be concentrated toward the Symbolic Lodge, which is our main source for new members and on ways to attract non-Masons to Freemasonry.
- Select District or County Chairman who are active, respected, and well known in both the Valley and the Lodges.
- Likewise, select Lodge Ambassadors who are active, respected, and well known in their Lodge and in the Valley.
- Establish good fraternal communications and relations with Lodge Masters, Secretaries and Lodge Officers

**(2) Define duties & responsibilities of District or County Chairman & Symbolic Lodge Ambassadors:**

A prospective leader will want to know, and has every right to know, what his duties and responsibilities will be, and what will be expected of him prior to his appointment.

**(3) Prepare a Budget:**

A budget should be prepared after all elements of the Program have been defined. The proposed budget should be submitted to the Committee for their consideration and approval. Adequate funding should be provided for all phases of the Program. Budgets should be prepared and approved annually, and they should be tracked and analyzed monthly.

Remember: The cost involved in developing and maintaining a membership development program is not an expense...it is an investment!

**(4) Valley: Define “geographic areas” within the jurisdiction of the Valley:**

It is important that good fraternal relations be established and maintained between Valley Leaders and the appropriate Grand Lodge representative who is responsible for the Lodges we wish to contact. Therefore, defining Valley geographic areas based on Symbolic Lodge districts or counties will facilitate communications between the appropriate Grand Lodge representative, the Lodges within the district, and the Valley.



**(5) Select District or County Leaders:**

As previously stated, the ideal leader will be active, respected, and well known in both the Valley and area Lodges. Ideal leaders are Past District Deputy Grand Masters, district committee chairmen, and others involved in district functions. Men who believe in the principles and purposes of the Scottish Rite. Their primary responsibility is to promote recruitment and retention of members.

**(6) Select Lodge Ambassadors:**

Select one or more Lodge Ambassadors for each Symbolic Lodge with the assistance and recommendation of the District or County Chairman. There is no limit on the number of Ambassadors that can be assigned. These are the individuals who will be directly involved in promoting Scottish Rite Masonry in the Lodge. The Lodge Secretary would be an excellent choice.

**(7) Prepare, Maintain and Regularly Update Contact Lists:** (From information collected by Lodge Ambassadors and coordinated through District or County Chairman and from Valley Secretary.) Such as:

1. Contact information for Masters and Secretaries of Blue Lodges, District Deputy Grand Masters, County Chairman and Ambassadors. Make note of when changes in offices occur, such as annual Lodge elections. Update accordingly.
2. A list of names, addresses, etc. of all active Symbolic Lodge members who are not members of the Scottish Rite
3. A list of names, addresses, etc. of all newly raised Master Masons
4. A list of the names, addresses, etc. of all Lodge elected officers, including the Lodge Secretary
5. A list of names and addresses, etc. of all eligible men who are in some way related to a Mason (heritage group)

**(8) Communications with Symbolic Lodge:**

Keep the District or County Chairman and Lodge Ambassadors informed about activities and events scheduled. (Note: The information should also be included in the Valley newsletter, on valley website and social media pages and communicated by email blasts. If these are not part of the Valley communication structure, contact Supreme Council for assistance in developing them. They are the methods of modern communication used by members and potential members.)

Write and inform Lodge secretaries, and active Lodge members who are NOT members of the Scottish Rite, about upcoming Valley events that might be of interest to them and their families.

Write a formal letter of congratulations to all newly raised Master Masons. Be sure to follow up letter with a personal contact by a Lodge Representative.

**(9) Delinquent Dues Members:**

Working with the Retention Committee, have the Valley Secretary prepare a list of delinquent dues members by Lodge. The list should contain name, address, and phone number, if possible.

Provide list(s) to respective Lodge Ambassadors for follow-up. A Valley member who knows the individual should attempt a personal contact, if possible. If not, a phone call should be made.

The reason for the personal contact is to remind the individual of his delinquency and to determine if there are financial, health, or other problems that preclude the payment of dues. If the problem is financial, appropriate arrangements for financial assistance can be made.

Results of the contact should be reported directly to the Chairman, who will in turn advise the Valley Secretary.

**(10) Monitor and Report Progress**

Determine benchmarks of progress and regularly record data relevant to reaching benchmarks. Regularly report the status of the data in relation to benchmarks to the team and at executive and stated meetings.

**(11) Recognition & Reward Program:**

Establish a program for recognizing and rewarding Valley members who contributed significantly to the success of the membership development program, or for obtaining a predetermined number of new members, or for their efforts at restoring to membership a predetermined number of brethren.

Also develop a program for members to be rewarded and recognized for other achievements. Service rewards, Masonic anniversaries, etc. Again, contact Supreme Council for information on rewards programs sponsored by it. There are many awards and recognition opportunities provided by your Council that can be used to add to your valley's program.

**VALLEY SECRETARY**

Communication is essential to a successful program. The Secretary in conjunction with the Chairman should be responsible for or oversee the issuance of valley communication about events and opportunities. Newsletters, email blasts, calling programs and communication with County Chairman and Ambassadors is essential.

Administrative support, as authorized by the Executive Committee or Board of Trustees and the Presiding Officers, must be provided to the Chairman and team members. It is particularly important that the Chairman have access, directly or indirectly, to computerized member records maintained by the Valley Secretary. Contact lists, mailing lists & labels, delinquent dues paying members, etc. are examples of the type of information that may be needed. Other support services could also be provided through the office of the Valley Secretary (e.g., assistance in the preparation of letters, announcements, notices or flyers, copy services, specialty mailings, etc.).

## ELECTED AND APPOINTED OFFICERS

Valley Officers serve their Valley by being on the Membership Development Team. At reunions and Valley functions, they attend to the membership by actively greeting, engaging and supporting our Brothers. They are responsible to participate in calling programs and visits to lodges and, when needed, to members. They are committed to visiting lodges in their valleys area to give presentations, announcements and to provide a direct connection to the leadership of the Valley. They should be ready to assist Lodge Ambassadors as they are the Valley's "At-Large" Ambassadors and have every responsibility that Ambassadors do.

### COUNTY OR DISTRICT CHAIRMAN

The District or County Chairman serves as a focal point between the Valley and Symbolic Lodges in his area. Overall, he is to ensure that the strategy and membership program adopted by the Valley are properly implemented in at the Symbolic Lodges level by the Lodge Ambassadors. He is personally active in membership development and helps identify members who would be committed Ambassadors. He should:

#### **(1) Support the Symbolic Lodge Ambassadors in the performance of their duties:**

- Provide Valley promotional literature and information to the Ambassadors for prospective members: petitions, etc., as needed
- Arrange for the use of audio video equipment, etc., when needed
- Arrange for Valley speakers at Symbolic Lodge meetings, when requested
- Arrange for assistance by the Scottish Rite Symbolic Lodge Degree Team, if one is available. If not, develop one from his area.

#### **(2) Schedule district or county meetings:**

Schedule interesting and informative meetings at least once every quarter. Combining the meeting with a dinner may prove popular. The events should be directed at **prospective Symbolic Lodge members, prospective Scottish Rite members**, as well as Scottish Rite members. Presiding Valley officers are encouraged to attend. Consideration should also be given to inviting family members, when appropriate.

(Note: Many Valleys already have Scottish Rite Clubs that perform this function.)

#### **(3) Plan, promote, and host an annual awards night dinner:**

With the support of the Valley, recognize and reward specific Symbolic Lodge members in the district or county for outstanding service to their Lodge, or for serving as Lodge Secretary, Worshipful Master, etc. The event should be heavily promoted and be open to all Lodge members and their families. Valley officers and other dignitaries should be encouraged to attend. This could also be Valley wide depending on geography and travel considerations.

#### **(4) Monitor activities & provide feedback:**

Keep Chairman informed as to status and progress of Program in the area Lodges and make recommendations for improvement. Produce a monthly/quarterly activities report. Forward informative lodge updates from Ambassadors to Chairman.

## **SYMBOLIC LODGE AMBASSADORS**

- Communicate & promote Scottish Rite programs and events, particularly (family) social events
- Arrange for Scottish Rite speakers or presentations at Symbolic Lodge meetings
- Encourage Scottish Rite members to become more active & involved in Valley activities
- Respond to county/district/Valley Chairman requests for information
- Provide feedback and make recommendations to improve the program
- Produce monthly/quarterly activities report

The Symbolic Lodge Ambassadors are the most important individuals upon which the success of the membership development program depends. It is primarily through their personal and persistent efforts at explaining and promoting Scottish Rite Masonry in the Symbolic Lodge that new members are gained. No limit should be set on the number of dedicated, committed, and knowledgeable Ambassadors assigned to a Lodge.

- (1) Explain and promote Scottish Rite Masonry in the Symbolic Lodge at every opportunity.
- (2) Recruit new members & work to retain existing members.
- (3) Promote Symbolic Lodge membership to non-members, whenever appropriate.
- (4) Announce and promote Valley programs & events.
- (5) Arrange for Scottish Rite speakers or presentations in the Lodge.
- (6) Encourage Scottish Rite members to become more active and involved in Valley activities.
- (7) Keep Valley brochures, petitions, etc. available for distribution.
- (8) Respond to District/County/Valley Chairman requests for information.
- (9) Provide feedback and make recommendations for improvement to the Program
- (10) Support the Symbolic Lodge Master and Officers in the performance of their duties.
- (11) Identify to the County/District Chairman specific Lodge members to be recognized for outstanding service to their Lodge, or for serving as Lodge Secretary, Worshipful Master, etc.
- (12) Help the Valley be a part of the Blue Lodge. Send a simple informative update (email) to the County/District Chairman on the lodge activities on a regular basis for example after lodge meetings or events.

## **AVAILABLE GUIDELINES FOR DEVELOPING A MEMBERSHIP DEVELOPMENT PROGRAM**

Your Supreme Council has invested significant funds and effort in researching and developing tools for valleys to use in membership development. Use them. Contact the Director of Membership Development. He would love to work with you. There is also a Membership Development Committee at Supreme Council. You may call its chairman.

It is essential that the Team Chairman receive all the support needed to develop and implement the Program. Both monetary and continuing administrative support will be required and generally should be considered a priority.

Since membership development efforts will be concentrated in local areas and Symbolic Lodges, it is highly desirable that the actual Program to be implemented be understood by and acceptable to the respective Grand Lodge. The involvement of the Deputy and or Active Members should prove beneficial in this regard.

Finally, the Committee needs to monitor progress during the development, implementation and maintenance phases of the Program on a regular basis, and provide guidance and feedback to the Chairman, as may be required, to assure success.

## **BROTHER-to-BROTHER (B2B) CALLING GUIDELINES**

Your assistance in confirming and updating a member's information is of great value to the Valley. After you return the contact sheets, we update the membership database. Thank you for taking the time to help.

On the white contact sheet (on Back), please confirm address, email, phone numbers, Nickname, and Blue Lodge number. Make note of any changes on the form. Check to see if they have a seasonal address (snowbird). Include that on the sheet and request approximate dates for that time away from home. Ask them about any military service to the Country and note that. Ask about health, family, hobbies, needs and make note of these. Get well cards will be mailed, as needed.

If you get an answering system, please leave a message asking them to call the office at \_\_\_\_\_ to confirm any changes in their personal information and any health issues or needs.

If you get a Not-In-Service message, please note that on the sheet. If we have two numbers, make sure that you try both. Many people are beginning to drop their land lines.

Sign your name at the bottom of the contact sheet and insert the date you called. Please make all comments legible. Be sure to sign and date the card before returning it to the office.

**B2B Script** (*Most important thing to do is LISTEN.*)

Good evening, this is \_\_\_\_\_ from the Scottish Rite, Valley of \_\_\_\_\_ . May I speak to \_\_\_\_\_ (brother)?

This is a brotherly call. The purpose of this call is twofold: 1) to check on you and your family; and 2) to confirm that we have your contact information correct. So, let me ask –

How are you? \_\_\_\_\_

Is there anything that the Scottish Rite can do for you? \_\_\_\_\_

Can I confirm your personal data – Address, email, Blue Lodge, phone numbers, service record, etc. \_\_\_\_\_

The valley cares about you. If something should arise, please don't hesitate to call the Office at \_\_\_\_\_ and let us know.

Thank you for taking the time to talk with me. We wish you the best and have a great week.

**General Notes:**

**Brother-to-Brother Calling Response Form**

Name \_\_\_\_\_ Nickname \_\_\_\_\_

Birthdate \_\_\_/\_\_\_/\_\_\_ Lodge Name & Number \_\_\_\_\_

Home Phone (\_\_\_)\_\_\_-\_\_\_ Work Phone (\_\_\_)\_\_\_-\_\_\_ Cell Phone (\_\_\_)\_\_\_-\_\_\_

Spouse Name \_\_\_\_\_ Children \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Seasonal Address \_\_\_\_\_

Occupation \_\_\_\_\_

Appendant Body Memberships \_\_\_\_\_

Offices Held \_\_\_\_\_

Other Memberships (Lions, Elks, VFW, etc.) \_\_\_\_\_

Hobbies \_\_\_\_\_

Community Service / Charities \_\_\_\_\_

## II. HISTORICAL BACKGROUND

### A BRIEF SURVEY

In its origin, the Scottish Rite of Freemasonry has no known geographic connection with Scotland. It developed from a system of 25 so-called “higher degrees”, which flourished in France in the mid-Eighteenth Century, and which came to be known as The Rite of Perfection. There is evidence that some of these degrees had an ancestral source also in England and Scotland.

In 1740, the Ecossais (Scottish) Lodge — Parfaite Harmonie — was organized in Bordeaux, one of the oldest and most influential Masonic centers in France. The membership included Scottish and English Masons. The line of descent, beginning with Bordeaux, runs through the Sovereign Council Sublime Ecossais Mother Lodge in Paris, the Chapter of Clermont, Knights of the East, Emperors of the East and West, and the Rite of Seven Degrees of England.

In 1761, the Masonic authorities in France granted a Patent to Stephen Morin of Bordeaux to carry the advanced degrees across the sea to America. In or about 1763, Morin established these degrees in the West Indies. Within a few years, other degrees were added until the Rite had a ritual structure of 33 degrees - the first three being exemplified in a Symbolic Lodge.

Henry Andrew Francken (1720–1795), deputized by Stephen Morin, organized a Lodge of Perfection in Albany, New York, in 1767 – the beginning of what was to become the Ancient Accepted Scottish Rite in the United States. During the Colonial period, Deputies appointed by Morin organized Masonic groups conferring the advanced degrees at points along the Atlantic seaboard. These groups were independent, without centralized supervision or control, except to agree that their authority came from Jamaica and Stephen Morin.

On May 31, 1801, a Supreme Council of the 33° for the United States of America was founded in Charleston, South Carolina, in an effort to unify competing groups and bring Masonic order out of chaos. Hence the motto — *Ordo ab Chao*. Later added was the description, The Ancient and Accepted Scottish Rite. The full membership of that Supreme Council consisted of eleven Grand Inspectors General who signed the original Register of 1802. Of these eleven, nine were born abroad but, in war and peace, had proved their loyalty to the United States. In religion, four were Jews, five were Protestants, and two were Roman Catholics. The Scottish Rite was an effective catalyst welding these men into an intimate and fraternal fellowship.

On August 5, 1813, Emanuel De La Motta, 33°, of Savannah, Georgia, a distinguished Jewish merchant and philanthropist and Grand Treasurer General of the Supreme Council at Charleston, organized, in the City of New York, “The Supreme Council of the United States of America.” Daniel Decius Tompkins, 33°, afterward Vice President of the United States (1817-1825), was chosen Sovereign Grand Commander and John James Joseph Gourgas, 33°, Grand Secretary General.

In 1827, the territory of the Northern Masonic Jurisdiction comprised the area now occupied by the following fifteen states: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Ohio, Michigan, Indiana, Illinois, and Wisconsin.

The Northern and Southern jurisdictions made slow progress in unifying the scattered degree-conferring groups and in standardizing rituals. They were handicapped by pride in their local organizations and leadership jealousies; by the Anti-Masonic agitation (1827–1840), which almost destroyed Freemasonry; by the Civil War (1861 – 1865), and by periods of depression. The process of unification in the Northern Masonic Jurisdiction was completed in the Union of 1867 — the beginning of a new era of growth in numbers and influence. There were 33 Valleys in 1867 (a significant coincidence) at the time of the Union.

At the time of the Union of 1867, there were approximately 4,200 Scottish Rite Masons in the Northern Masonic Jurisdiction. Membership was quite limited, and no attempt had been made to “popularize” either Masonry or the Scottish Rite. But, inspired by the new spirit of harmony that prevailed, membership began to increase rapidly. The year 1890 saw 15,000 members; 1910—61,000; 1920—210,000; and 1933—279,000. Then came the decline of the Thirties, followed by the tremendous upswing after World War II.

Following the Union of 1867, Scottish Rite Masonry began to flourish. Old enmities and jealousies were erased and allowed to die. New Bodies and many new Valleys were instituted. The conferral of degrees, which at best had been haphazard prior to 1867, was strengthened by revision of the ritual structures of the Rite. The Valleys started to build fine new temples dedicated to the work of the Rite. Splendid degree presentations, with elaborate scenery and costumes, became commonplace.

Many noteworthy events have transpired in the last 100 years. An International Conference of Supreme Councils was first held at Brussels, Belgium in 1907. This was followed by others at intervals throughout the years, and the 11th of such conferences, at which Ill. George A. Newbury, 33°, presided as President, was held in Indianapolis in 1975.

A Declaration of Principles, setting forth the basic and fundamental philosophy of the Rite, was first adopted by the Supreme Council in 1923, reaffirmed in 1929 and 1934, and revised from time to time. The declaration was read or presented from memory to each initiate. It succinctly sets forth the principles upon which all Scottish Rite Masons may agree. The Supreme Council believes that basic Masonic principles are changeless, but that the organization should be ever ready to meet the changing needs of the times. Currently, all Degrees exemplify the Core Values of our Fraternity: justice, integrity, toleration, service, reverence for God, and devotion to country.

In 1917, a Jubilee Year celebration was held, honoring the 50th year of the Union of 1867. In 1967, centennial observances were held in all Valleys of the Rite. In 1975 – 1976, a great many special programs were held relating to the 200th anniversary of the signing of The Declaration of Independence of our country.

In 1922, a college scholarship program was inaugurated with an initial appropriation from Supreme Council funds. In 1932, Ill. Leon M. Abbott, 33°, Sovereign Grand Commander from 1921 until his death in 1932, bequeathed \$50,000 to establish an



Education and Charity Fund. The first Abbott scholarship was awarded in 1951. For many years, the scholarships were presented to journalism students at selected universities throughout the Northern Masonic Jurisdiction. In 1984, it was voted to expand the scholarship program by awarding grants to children of Scottish Rite members and to young people active in the youth groups affiliated with the Masonic fraternity. In 1985-86, the first academic year, funds were allocated for 68 scholarships.

The Supreme Council adopted a Meritorious Service Award program in 1937, providing for the recognition by Councils of Deliberation of those members who render outstanding service to the Rite. In 1938, the Gourgas Medal was established. It may be awarded to members of the Rite by the Supreme Council or by the Sovereign Grand Commander in recognition of notably distinguished service in the cause of Freemasonry, country, or humanity.

In 1934, the Supreme Council established its program for Research in Dementia Praecox, now called Schizophrenia, with an appropriation of \$15,000. This program has grown throughout the years. The Supreme Council awards Fellowships to students in universities in our jurisdiction. The Supreme Council's pioneer work focused national attention on the problem, and great strides have been made in the relief of the worldwide scourge of mental illness.

In January 1970, Volume 1 Number 1 of *The Northern Light* was published. It was soon to be the preeminent Masonic periodical under the leadership of Richard Curtis, 33°.

The Scottish Rite Masonic Museum and Library Inc., in Lexington, Massachusetts, is another benevolent endeavor of our Supreme Council. Opened in 1975, this institution has fulfilled a dream to give to the people of this great nation and fraternity a gift that will, for decades to come, reflect the spirit of our people, as well as the events and institutions that have shaped this land of hope and freedom.

The Museum and Library is now called the National Heritage Museum and continues to demonstrate to the public our love of country, love of our flag, and a firm belief in our democratic institutions as fundamental principles of all Masonic organizations. The National Heritage Museum is one of the largest Masonic libraries and is a repository of Masonic artifacts in the country.

In May 1999, Ill. Robert O. Ralston, 33°, presided over the XIV Conference of the Americas held in Boston, Massachusetts.

The Millennium year, 2000, was a year of celebration. April 29, 2000 was a special day for Scottish Rite in our jurisdiction. The Millennium Class of 3,400 Master Masons received the 32° at 50 locations on the same day. On July 29, 2000, the Grand Master of Massachusetts, with the assistance of representatives from each of the 15 Grand Lodges in the jurisdiction, laid the cornerstone for a new headquarters building on our Lexington campus. The old headquarters was incorporated into a beautiful new modern building.

In 1994, the Scottish Rite Freemasons of the Northern Masonic Jurisdiction partnered with Massachusetts General Hospital's Language Disorders Unit to launch a major endeavor to help ease the life-long challenges faced by children with dyslexia. Until this program was

launched, no other national charity had adopted this critical need as a major concern. Today, the program is nationally recognized for its efforts to help children and their families overcome the painful obstacles of dyslexia. Our more-than-40 Dyslexia Centers in 13 states provide intervention at reduced fees or no charge to children from early elementary through high school who have a profile suggesting dyslexia. Children are eligible regardless of economic status. The positive impact of early intervention on the lives of these children and their families is enormous and inspires our commitment to this program.

History was made at the 2007 Annual Meeting. For the first time since the formation of the Northern Masonic Jurisdiction, nearly two centuries ago, the Northern and Southern jurisdictions of Scottish Rite of Freemasonry met together. The 33<sup>o</sup> degree was performed by both the NMJ and the SMJ. Peace and harmony prevailed.

In 2009, the Fourth Degree was rewritten and digitized to be shown to Scottish Rite candidates. It was to set the stage for further degrees being set to video.

In 2016, the Grand Almoner's Fund committed \$500,000 annually to Masons, their children, and their widows in need, regardless of affiliation. The funds provide relief at-the-ready to Masons in crisis when they need it most.

In 2017, the Supreme Council of the Scottish Rite commissioned the most comprehensive, data-driven analysis of the Scottish Rite and Freemasonry in more than 20 years. The results of this study are outlined in the J.W. McNaughton book "Reclaiming the Soul of Freemasonry". This was the platform for the marketing initiative "The Path Forward" that streamlined the Masonic message nationally and internationally.

The following distinguished leaders of Masonry have served as Sovereign Grand Commander since the formation of the Supreme Council in 1813:

*Prior to the Union of 1867*

Daniel D. Tompkins	1813 - 1825
Sampson Simson	1825 - 1832
John James Joseph Gourgas	1832 - 1851
Giles Fonda Yates	1851
Edward A. Raymond	1851 - 1860
Killian H. Van Rensselaer	1860 - 1867

*Following the Union of 1867*

Josiah Hayden Drummond, 33°	1867 - 1879
Henry Lynde Palmer, 33°	1879 - 1909
Samuel Crocker Lawrence, 33°	1909 - 1910
Barton Smith, 33°	1910 - 1921
Leon Martin Abbott, 33°	1921 - 1932
Frederic Beckwith Stevens, 33°	1932 - 1933
Melvin Maynard Johnson, 33°	1933 - 1953
George Edward Bushnell, 33°	1954 - 1965
George Adelbert Newbury, 33°	1965 - 1975
Stanley Fielding Maxwell, 33°	1975 - 1985
Francis George Paul, 33°	1985 - 1993
Robert Odel Ralston, 33°	1993 - 2003
Walter Ernest Webber, 33°	2003 - 2006
John William McNaughton, 33°	2006 - 2017
David A. Glattly, 33°	2017 -

### III. SUBORDINATE BODIES

#### IN GENERAL

The Constitutions of the Supreme Council of the Ancient Accepted Scottish Rite of Freemasonry, N.M.J., provide that **“the Supreme Council shall possess exclusive power and final control, executive, legislative, and judicial”** over all Bodies of the Rite.

While each Scottish Rite Body in a Valley is subordinate to the Supreme Council, it is coordinate in relation to every other Scottish Rite Body in the Valley. Each Body operates under its own Dispensation and Charter and is the equal of every other Coordinate Body in rank, authority, rights, and privileges. The Presiding Officer of one Body does not outrank the Presiding Officer of another Coordinate Body, nor does the Presiding Officer of one Body have any authority over any other Coordinate Body.

While each Coordinate Body is autonomous, it is of the utmost importance that all the Bodies in a Valley coordinate their efforts and cooperate fully in the establishment and maintenance of a harmonious, unified, and effective management of the Scottish Rite affairs in their Valley. It is, therefore, expected that each Valley having more than one Subordinate Body (by joint Regulations adopted by each Subordinate Body) shall create a Governing Board or an Executive Committee to coordinate their activities. Thereafter the role and duties of such presiding officers shall be subordinate and subject to such joint regulations as shall have been duly adopted by such Governing Board or Executive Committee. The Constitutions provide that the Presiding Officer of each Coordinate Body shall be a member of such Board or Committee.

#### ALLEGIANCE

The approved form of Allegiance should appear on official notices and periodically in Scottish Rite publications as follows:

The Bodies of the Scottish Rite, sitting in the Valley of \_\_\_\_\_, State of \_\_\_\_\_, acknowledge and yield allegiance to the Supreme Council, 33°, Ancient Accepted Scottish Rite of Freemasonry for the Northern Masonic Jurisdiction of the United States of America, whose Grand East is in Lexington, Massachusetts, and whose Officers are:

III. \_\_\_\_\_, 33°  
Sovereign Grand Commander

III. \_\_\_\_\_, 33°

Deputy for \_\_\_\_\_

and whose other Active Members for the State of \_\_\_\_\_ are:

III. \_\_\_\_\_, 33°

(List Active Members by seniority)

## **OATH OF FEALTY**

It is of the greatest importance that each candidate and each member fully understand that the Oath of Fealty is a symbol of the unity of the Scottish Rite. This Oath of Fealty protects the Body of the Rite against potentially unworthy candidates and members, and it assures the initiate that he is entering a legally constituted Scottish Rite Body, not one which is clandestine, illegal, or spurious. Every candidate for the Scottish Rite degrees in this jurisdiction signs the Oath of Fealty as an integral part of his application for such degrees.

Every brother admitted from a jurisdiction other than the N.M.J., by affiliation, must sign this Oath of Fealty, which is an integral part of his petition for affiliation. Such Oath shall be in form as follows:

“I, the undersigned, do hereby promise on my word of honor, and swear true faith, allegiance, and fealty to the Supreme Council of Sovereign Grand Inspectors General of the Thirty-third and Last Degree of the Ancient Accepted Scottish Rite of Freemasonry for the Northern Masonic jurisdiction of the United States of America, sitting at its Grand East in the Town of Lexington, Massachusetts, of which the Illustrious \_\_\_\_\_, 33°, is the Sovereign Grand Commander, and will support and abide by its Constitutions, Orders, and Decrees.

“That I will hold allegiance to the said Supreme Council and be loyal thereto, as the supreme authority of the Rite; will hold illegal and spurious every other Body that may be established within its jurisdiction, claiming to be a Supreme Council to which said Supreme Council has not extended due recognition as such; and every other Body of said Rite within the same jurisdiction that does not hold its powers from said Supreme Council, or from a Supreme Council recognized by it, and will hold no communication whatever in Scottish Rite Masonry with any member of the same nor allow him to visit any Body of the Rite of which I may be a member; and I will dispense justice to my brethren according to the laws of equity and honor.

“And should I violate this, my solemn vow and pledge, I consent to be expelled from Scottish Rite Masonry, and all rights therein and in any Body of the Rite, and to be denounced to every Body of the Ancient Accepted Scottish Rite in the world as a traitor and forsworn.

“And may God aid me to keep and perform the same. Amen.”

## **DECLARATION OF PRINCIPLES**

The following Declaration of Principles shall be read in an impressive manner to all candidates before they take their first degree of the Scottish Rite:

“This Supreme Council reaffirms its unswerving loyalty to the fundamental purpose of Freemasonry, which purpose from time immemorial has been to improve and strengthen the character of the individual man, and through the individual, the character of the community, reinforcing those spiritual and moral values, which give the community its strength and stability.

“This Supreme Council believes that this purpose is to be attained by laying a broad basis of principles upon which men of every race, country, sect and opinion may unite.

“Believing that good and true men can be trusted to act well and wisely, this Supreme Council considers it the duty of the Fraternity to impress upon its members the principles of personal righteousness and personal responsibility, to enlighten them as to those things which make for human welfare, and to inspire them with that feeling of charity, or well wishing, toward all mankind, which will move them to translate principle and conviction into action.

“To that end Freemasonry requires of its members a belief in God and encourages faith in God’s divine purposes and worship of God in conformity with the dictates of individual conscience. It stands for truth and justice, liberty and enlightenment, fraternity and philanthropy.

“This Supreme Council expects of its members strict obedience to the laws of the land, and respect for their country’s flag.

“Such principles unite men and encourage the pursuit by them individually and collectively of worthy endeavors and the attainment of the purposes inherent in them. In that unity, human character achieves its highest unfolding and provides man’s best hope for peace on earth and good will among men.

“To the furtherance of these principles, all our ritual is directed, and all our efforts are aimed. To their furtherance each Master Mason has pledged himself, and at the portal of the Scottish Rite has renewed that pledge.

“This Supreme Council discountenances and rejects any attempt by any international groups or confederations of Scottish Rite Supreme Councils to legislate for individual Supreme Councils.

“Recognizing that principles unite men, that programs sometimes divide them, and that the preservation of unity of purpose and devotion to principle is essential to Freemasonry, the Supreme Council affirms its continued adherence to that ancient and approved rule of Freemasonry, which forbids the discussion within tyled doors of creeds, politics, or other topics apt to excite personal animosities.

“This Supreme Council further affirms its conviction that it is not only contrary to the fundamental principles of Freemasonry, but exceedingly dangerous to its unity, strength, usefulness, and welfare for Masonic Bodies in their official capacity to take formal action or attempt to exercise pressure or influence for or against any particular legislative project or proposal, or in any way to attempt to procure the election or appointment of governmental officials, whether executive, legislative, or judicial, or to influence them, whether or not members of the Fraternity, in the performance of their official duties.”

## **DECLARATION FOR OPENING AND CLOSING**

The Constitutions require each Subordinate Body when meeting separately to open and close its work by pronouncing the following Declaration:

“To the glory of the Grand Architect of the Universe, in the name and under the auspices of the Supreme Council of Sovereign Grand Inspectors General of the Thirty-third and Last Degree of the Ancient Accepted Scottish Rite of Freemasonry for the Northern Masonic jurisdiction of the United States of America, and by virtue of the authority upon me conferred, I declare the works of the Valley of .....  
(name of the Subordinate Body) opened (or closed, as the case may be).”

The declaration should be used only when “Opening” or “Closing” a Subordinate Body of the Scottish Rite. It should not be used in connection with the opening or closing of a ritualistic Degree.

Note: If the installation ceremony is to be open to non-members, the Body or Bodies may be opened informally, without the usual Constitutional Declaration and may be closed with a benediction.

## **FUNCTIONS OF THE DEPUTY AND ACTIVE MEMBERS**

(1) It is imperative for every officer to acknowledge the authority of the Deputy of the Supreme Council in his State as specified in the Constitutions. As the official representative of the Supreme Council and of the Sovereign Grand Commander, the Deputy is charged with the responsibility of requiring strict compliance with the Constitutions, laws, rules and regulations of the Supreme Council and with the decisions, edicts and orders of the Sovereign Grand Commander. **The Deputy has the power to disapprove the selection of, and to remove from office**, any officer, trustee, director, representative, or employee of the Council of Deliberation or of a Subordinate Body in his state, or of any agency, committee, or related corporation of such Council or Body in his State. If, in consequence of such removal, there shall be no one to succeed to the office, he may appoint a person to the office with full power to act until the vacancy is regularly filled. The Deputy serves as the Illustrious Commander-in-Chief of the Council of Deliberation of his State. In addition, he inspects the work of the Rite in the various Valleys, corrects any irregularities that he may discover, and sees that the official rituals are impressively exemplified as prescribed.

The Deputy is always available for counsel and for such visitations as are mutually convenient, but fraternal consideration should protect him from unreasonable demands.

(2) Officers should be familiar with the status, duties, and privileges of an Active Member of the Supreme Council. In general, an Active Member exercises such authority as is conferred upon him by the Constitutions and also such authority as may be delegated to him by the Sovereign Grand Commander or Deputy. He may attend all meetings of the Governing Board or Executive Committee of a Valley and all committees or boards subordinate thereto.

He does not represent his Valley or State in the Supreme Council, but he does represent the Supreme Council in his State. He has the right to be received formally in all Bodies opened on any of the Degrees of the Ancient Accepted Scottish Rite in any State of this Jurisdiction and to inspect their work and practices. He shall report to the Deputy of that State any irregularity in ritual or business that comes to his attention. As a counselor, he works in close cooperation with the Officers of the Bodies in his State and the Presiding Officers of such Bodies should avail themselves of his counsel and guidance.

## **DEPUTY'S REPRESENTATIVE**

The Deputy may appoint a Deputy's Representative in each Valley in the State, to serve for a term of one year and re-appointed at the discretion of the Deputy. He shall be invested with such authority, privileges, and responsibilities in the Valley for which he is appointed. The Deputy's Representative needs to be a Scottish Rite, NMJ Freemason. There is no other degree or past positions required for the post.

### **GUIDELINES FOR DEPUTY'S REPRESENTATIVE DUTIES, RESPONSIBILITIES AND PREROGATIVES**

**(subject to change by the Deputy)**

1. To assist the Deputy and Active Members in the discharge of their management and administrative responsibilities, and to exercise those responsibilities delegated to him by the Deputy.
2. To stimulate open lines of communication and initiate dialogue between the Officers and members of the Valley and the Active Members of the Supreme Council.
3. To implement the policies, procedures, and directives of the Deputy, and see that customs, usage, and laws of the Supreme Council are properly observed.
4. To be a resource to the Valley, its leadership and members in bringing to the attention of the Deputy and the Supreme Council their ideas, thoughts, needs, recommendations, complaints, and other matters of concern.
5. To attend meetings of the Officers and Bodies in the Valley.
6. To oversee the following:
  - a. that a Membership Development Program is active and effective, and that statistics and trends are evaluated and submitted as required by Supreme Council;
  - b. that a Membership Retention Program is in existence and constantly utilized, recognizing that no member 80 years of age or older should be suspended for nonpayment of dues;
  - c. that Family Life programs and other social functions are reported to Supreme Council and critiqued as to effectiveness and relevance;
  - d. that assistance be given in improving Valley publications and other communications with the membership of the Valley;
  - e. that all provisions of the Constitutions are strictly observed;
  - f. that endeavors and programs of the Sovereign Grand Commander, Supreme Council, Deputy, and Council of Deliberation are supported in earnest; and
  - g. that recommendations regarding potential officers and other leadership appointments, are given as necessary.



7. During his term, the special Deputy's Representative Insignia of office may be worn when attending meetings within his assigned Valley as a mark of recognition and distinction. The collar shall not be worn at a meeting in any other Valley, except when invited to do so by the Deputy or Active Member.
8. The Deputy's Representative should be accorded recognition by introduction at meetings of the Bodies in his Valley. In the absence of the Deputy or Active Members, he will be accorded the same courtesies as the Deputy or Active Member.
9. The name and title of the Deputy's Representative should be inscribed on all meeting notices directly below the names of the Active Members.

## **HONORARY MEMBERS OF THE SUPREME COUNCIL**

As Sovereign Grand Inspectors General, the Honorary Members of the Supreme Council should be given formal recognition on ceremonial occasions. As distinguished members of the Supreme Council, they have the duty and responsibility to cooperate at all times with the Deputy and the other Active Members of the State, and with the Scottish Rite Officers of the local Valley in providing leadership, in promoting the interests of the Supreme Council and the Scottish Rite throughout their State.

The Secretary shall immediately notify the Deputy, Active Members, and Emeritus Members in the state of the death of an Honorary Member and the Secretary shall also notify the headquarters office. Post cards for this purpose will be furnished on request. Following receipt of such notification, the headquarters office will request a memorial, not over 300 words in length, containing such information as to whether or not a widow survives, time and place of memorial services and place of burial. This is vital statistical material that may be needed for future generations. It has been particularly helpful in genealogical studies and for histories. The memorial should be prepared and mailed promptly. There is usually an allowance of 45 days.

An illuminated copy of the memorial in purple and gold, together with a personal letter from the office of the Grand Secretary General, will be sent to the surviving widow, if any.

## **MERITORIOUS SERVICE AWARD**

The Supreme Council annually requests from the Secretary of the Council of Deliberation a list of the newly elected Meritorious Service Awardees. This information becomes a matter of permanent record in our membership database and the Annual Proceedings. No further notice of election, presentation of the Award, or death is required.

## **BY-LAWS**

The Supreme Council maintains a complete file of By-Laws (Rules and Regulations) of all of our Scottish Rite Bodies.

If changes in the By-Laws are made, copies of the changes, approved by the Deputy, shall be sent to the Grand Secretary General.

When changes in by-laws are contemplated, it is suggested that this procedure be followed.

1. Appoint a committee to review the proposals and draft the desired changes.
2. Send the proposal to the Deputy for his review with a copy of the current section that is to be amended by the proposal.
3. At the same time, send a copy of the proposal to the Chairman of the Committee on Constitutions, Laws and Jurisprudence for his review with a copy of the current section that is to be amended by the proposal.
4. After the proposal has been approved by the Deputy and the Chairman of the Committee on Constitutions, Laws and Jurisprudence; the proposal should be presented to the appropriate Body or Bodies for final consideration.
5. A copy of the action taken should be recorded the minutes of the meeting.
6. Notify the Deputy of the final action taken.
7. Action taken without prior approval will not go into effect until approval is given and any modification required has been made.
8. Whenever a Valley reprints its by-laws, a copy shall be sent to Supreme Council for the permanent files.

## **CORRESPONDENCE**

Titles are an internal fraternal concern and do not belong on envelopes or address labels. Do **NOT** put titles of addressees on envelopes, external covers of packages or similar items.

## **MEETINGS**

The Constitutions provide that “each Subordinate Body shall meet at least four times annually” and that “special meetings may be called by the Presiding Officer of any Body at any time he may deem necessary.” Notice of all meetings of a Subordinate Body must be given to the Members “in such manner as shall be prescribed by the Rules and Regulations adopted by such Bodies.”

The quorum required for the transaction of business by a particular Subordinate Body is set forth in the Constitutions.

## **JOINT BUSINESS MEETINGS**

Joint business meetings, including balloting of all the Coordinate Bodies in a Valley, are provided for in the Constitutions. Joint meetings greatly facilitate the transaction of business, and Valleys are encouraged to make use of them. Notices of joint meetings should bear the names of all of the Presiding Officers. The proceedings in connection with any joint

meeting should be recorded in the Minute Book of each Coordinate Body. The Presiding Officer of that Subordinate Body, which is the Fiscal Agency, may preside, or, by mutual arrangement, the Presiding Officers may serve in rotation.

In opening the joint meeting, each Presiding Officer should declare his Subordinate Body open; this can be done readily by making the necessary adaptation of the Declaration for Opening and Closing.

Care should be taken to assure that only members of a particular Subordinate Body vote on matters concerning that Body. The Presiding Officers should remind the members that only eligible members should vote.

The “election of officers must not be conducted in a joint meeting, but in a separate meeting of each Body concerned, held consecutively if on the same day.”

## **CONDUCT OF MEETINGS**

The meetings should be opened promptly at the appointed time. Nothing discourages attendance more than tardy openings. Do not permit the tardiness of an officer to delay the opening of meetings. A substitute should be appointed.

The Presiding Officer is responsible for the conduct, deportment, finances, work, and general performance of his Body, and for compliance with the written requirements of the Constitutions of the Supreme Council, together with the unwritten requirements of Masonic tradition and custom.

All meetings should be conducted on a high plane and in a dignified manner. They should be conducted with dispatch, but not in haste.

A general knowledge of parliamentary procedure is essential, especially the forms of making motions, directing debate, rules governing amendments, and rules of conduct. A meeting need not be ultra-formal, but it is imperative to maintain order and dignity.

*Robert’s Rules of Order* shall be used and shall govern the conduct of all meetings.

## **SUGGESTED ORDER OF BUSINESS**

The order of business at any regular or special meeting of a Subordinate or Coordinate Body shall be as follows:

- (a) Call to order and opening Declaration
- (b) Invocation
- (c) Pledge of Allegiance
- (d) Reading and consideration of minutes
- (e) Action and/or voting on
  - (1) remission of dues,
  - (2) suspensions and demits,
  - (4) petitions
- (f) Consideration of all fiscal and committee reports
- (g) Unfinished business
- (h) New business
- (i) Closing Declaration

## **MEETINGS FOR INSTALLATION OF OFFICERS**

Every ceremony of installation of the elected or appointed officers should be performed in a formal, dignified, and impressive manner. Every officer, elected or appointed, should be formally installed for the term of his office.

Each Subordinate Body may elect to have its own separate installation, or all of the Coordinate Bodies may elect to hold a joint installation. Installations may be either "Open" or "Closed," except in a State in which the Council of Deliberation has prohibited open installations.

If the installation ceremony is to be open to non-members, the Body or Bodies may be opened informally, without the usual Constitutional Declaration and may be closed with a benediction.

If a separate installation is to be held for a single Subordinate Body, the Presiding Officer of that Body shall select, subject to the constitutional right of the Deputy to so act, an Installing Officer and a Marshal. If a joint Installation is to be held for the several Coordinate Bodies, the several Presiding Officers shall select, subject to the Deputy's prerogative, a Convening Officer to preside during the ceremony, a Master of Ceremonies, an Installing Officer, and a Marshal. In either event, if an Active Member and/or Deputy's Representative is available, he or they shall be invited to participate.

Each Presiding Officer should thoroughly familiarize himself with those provisions governing the installation of officers in Subordinate Bodies, which are contained in the following:

- (a) The Constitutions
- (b) Book of "Forms and Ceremonials"
- (c) Book of "Ceremonial of Open Installation of Officers of Subordinate Bodies"
- (d) Manual for Officers

The Secretary should keep a complete record of the Ceremony of Installation (whether it be separate or joint, open or closed), which should be incorporated in the Minutes of each separate Subordinate Body participating in the installation.

## **TRADITIONAL MEETINGS**

Attention is called to the Constitutions relating to the observance of "Traditional Meetings" of Lodges of Perfection, Councils of Princes of Jerusalem, and Chapters of Rose Croix. All Valleys are encouraged to consider the observation of these Traditional Meetings as they provide opportunities for promoting the interests of Scottish Rite and Freemasonry.

## RETENTION COMMITTEE

Each Valley shall establish and maintain an active retention committee. Every request for a demit, except for the purpose of transferring membership to another valley, should be personally investigated to determine if there is any possibility of saving the membership. The Valley Secretary shall refer all members in arrears to this committee.

Every effort should be made to maintain the membership of those who have fallen behind in their dues. To that end, a personal visit or telephone call should be made with the member no later than June 30th of the year in which the dues were not paid. If the dues are still not paid by September 1st of the same year, an additional personal contact should be made, with a follow-up written note within 30 days. If investigation reveals that the delinquency is caused by financial problems, appropriate arrangements for assistance should be made. Members of this committee should work closely with the Membership Development Committee.

## REMISSION OF DUES

No masonic body should suspend, for non-payment of dues, any member who is unable, because of financial or physical conditions, to pay such dues. It is urged that extreme care, discretion, and as much investigation as practical (including periodic reviews) be applied to all programs and policies relating to the remission of dues. Ideally, no member should be suspended for non-payment of dues when such payment would be a hardship.

## SENIOR-MEMBER PROGRAM

The Senior Member program was implemented to ensure that **NO** member over the age of 80, or a member having financial hardship who has been a member of Scottish Rite, NMJ for 50 years or more and is a minimum of 75 years of age, would be '**Suspended for Non-Payment of Dues**'. The policy states that a "*member in danger of suspension will be contacted by the Valley, using a Personal Contact Form designed for that purpose. "If, after following the proper procedure, the member would still be in danger of Suspension, the Valley Secretary will submit a letter to Deputy of his State stating that the member qualifies for Senior Member Status and that he has secured approval of the Valley officers and the Valley Board of Directors/Trustees."*

All requests for Senior Membership must now be approved by the Deputy before being processed. If approved, the Deputy will forward the request to *Supreme Council Headquarters* for processing.

The Senior Member program requires the following:

1. Personal contact with the member
  - a. Determine reason dues have not been paid or demit has been requested, such as: financial problem, lost interest, cannot attend meetings, etc.
  - b. If moving to a new area and intends to affiliate locally, demit should be granted.

2. If some interest is shown in desiring to remain a member, "Senior Member" status may be applied for. Should this be done, the member would be considered a regular member with all the usual rights and privileges but would not be required to pay any dues. "Senior Members" would not be included in the total membership figures subject to the Supreme Council yearly assessment.

This recommendation must be reviewed and approved by the Retention Committee, Presiding Officers, Board of Directors/Trustees and the secretary's office prior to being sent to the Deputy.

Once granted, the member's record will be updated with the new Senior Member Status and he will no longer receive a dues notice of any kind. The member will not be billed Valley dues, any Valley assessments, Supreme Council Assessments and Fees or any other charge. Likewise, Supreme Council will not bill the Valley for Assessments and Fees on this member.

## **OFFICERS**

No one except the Treasurer, Secretary, Hospitaler, or Tyler (Sentinel), shall hold office in more than one Coordinate Body at one and the same time.

The same person shall not hold the offices of Secretary and Treasurer of a Subordinate Body at the same time.

No one shall be elected as a Presiding Officer who has not previously served in one of the first three offices of the same Body of the Rite unless such requirement is waived by the Deputy for the State.

Appointments to office should be based upon such qualifications as:

- (a) Dedication to and personal action in obtaining new members and retention of present members;
- (b) Competence in leadership and initiative;
- (c) Industry & Dependability;
- (d) Ready availability for performance of assignments;
- (f) A willingness to assume and discharge the duties of office; and
- (g) Full cooperation with the Presiding Officers, Deputy's Representatives, Active Members, and Deputy.

Advancement or promotion in the "line" should be based upon the same qualifications, with a very satisfactory record on membership, performance in previous offices in the Body, and not upon a "ladder-promotion" policy or practice. Preferably no "line" for advancement purposes should start more than two or three stations from that of the Presiding Officer.

Each officer, elected or appointed, should make a careful and thorough study of the Constitutions, especially the Chapters entitled "Subordinate Bodies," "Members," "Candidates," "Rituals," "Forms", and "Regalia".

Each officer should be given, at the time of his election or appointment, certain specified duties and responsibilities that must include membership. They should be reviewed annually thereafter with each officer.

## **DUTIES OF OFFICERS**

*“The post of honor is the post of responsibility.”*

### **GENERAL**

To be elected or appointed to any office in a Scottish Rite Body is a distinct honor, which carries with it responsibility. Those who accept these honors must be prepared and willing to undertake the duties and responsibilities of their offices with the realization that some personal sacrifice will be necessary.

It is not intended that holding office in a Scottish Rite Body should interfere with an officer's vocation and his efforts to earn a livelihood. However, when any other cause, unless it be illness or death in the family, prevents his expected and required attendance at the meetings, rehearsals, and reunions, he errs in expecting that his absence will be overlooked. If absence results from the pressure of one's usual vocation, or from illness, the members are usually very considerate in forgiving the absence. However, if it is the result of lack of interest or conflict with what might be termed personal pleasure, continued approval cannot be expected. Under such circumstances, he should make way for another member who is more interested and willing to serve more faithfully.

Each officer should consider increasing membership and retaining present membership as a high priority.

Interest, attendance, punctuality, and devotion to duty by all officers will inevitably result in success through cooperative and zealous teamwork.

A portion of the obligation taken by an officer at his installation in a Scottish Rite Body is as follows:

“I will seek diligently to acquire a due knowledge of the rituals, usages and administrative procedures of the Ancient Accepted Scottish Rite in this Jurisdiction, and especially, to comply with the duties of my office. I will strive earnestly to promote the welfare of my Brethren and of our Rite, and to maintain peace and harmony in a spirit of courtesy and fraternal cooperation.”

### **PRESIDING OFFICERS**

The primary duties of a Presiding Officer of a Subordinate Body are prescribed in the Constitutions and provide the following:

Except as provided in the Succeeding paragraph, “it shall be the duty of the Presiding Officer of a Subordinate Body to preside at all meetings thereof, appoint all committees, and be ex officio a member of the same with voting rights. He shall discharge all the duties prescribed for him by the Constitutions and rituals of the Supreme Council and the usages and customs of the Rite; but the Presiding Officer of a Subordinate Body shall have and exercise no authority or control over any other Subordinate Body.

“In a Valley having a Council, Chapter, and Consistory, or any one or more of them in addition to a Lodge of Perfection, joint regulations of such Bodies may provide for a Board of Officers or Executive Committee with power and authority to coordinate the activities

of all the Subordinate Bodies in that Valley, including the acquisition, management, and control of all properties for the common good, the scheduling of degrees, the appointment of committees, the fixing of budgets, the management of finances, and other appropriate common activities provided only that the Presiding Officer of each such Subordinate Body in such Valley shall be a member of such Board of Officers or Executive Committee. Thereafter, the role and duties of such Presiding Officers shall be subordinate and subject to such joint regulations as shall have been duly adopted by such Board of officers, Executive Committee, or other appropriate Committee.”

A Presiding Officer is required to give his assent to the following charges of the Ancient Accepted Scottish Rite:

- to pay true allegiance and fealty to the Supreme Council;
- to support its Constitutions, Statutes, Orders and Decrees;
- to agree not to engage in any plot or conspiracy against the civil government;
- to obey the laws of our country;
- to submit peacefully to the will of the majority;
- to avoid disputes and quarrels;
- to be impartial, upright and modest;
- to refrain from all intemperance and excess;
- to be faithful to his Brethren and courteous to all men;
- to exercise hospitality;
- to receive all duly accredited visitors;
- to reject imposters;
- to rebuke those who would seek to disturb peace and harmony;
- to guard zealously the Charter of the Body over which he is called to preside;
- to permit no one to receive any degree of the Ancient Accepted Scottish Rite unless he be a Master Mason in good standing and qualified in accordance with the Constitutions and Regulations of the Rite.

It is the further duty of each Presiding Officer to observe and enforce such rules and regulations governing his Body as are consistent with the Constitutions of the Supreme Council, and the rules and regulations of the Council of Deliberation of his State.

The Presiding Officer shall be responsible for the organization of the Body under his direction. He shall be responsible for the Officers in performing their assigned duties.

The Presiding Officers in each State shall present recommendations in writing to the Council of Deliberation nominating members to receive the Meritorious Service Award.

Each Presiding Officer should study and familiarize himself with the following:

- (a) Constitutions of the Supreme Council;
- (b) “Forms and Ceremonials” authorized by the Supreme Council;
- (c) “Ceremonial of Open Installation of Officers of Subordinate Bodies”;
- (d) Manual for Officers;
- (e) Rules and Regulations of the Council of Deliberations in his State;
- (f) Rules and Regulations of the Subordinate Body of which he is the Presiding Officer and of the other Coordinate Bodies of the Rite in his Valley; and
- (g) the ritual of each degree conferred by his Subordinate Body including the Historical Notes and Sacred words pertaining to such ritual.



## **OTHER ELECTED AND APPOINTED OFFICERS**

All officers should perform the duties of their respective offices and assist the Presiding Officer of the Body in which they serve, and they shall perform such other tasks that may be assigned to them.

The Treasurer, Secretary, Trustees, other Officers, and Committees shall perform those duties which are assigned to them by the Constitutions of the Supreme Council and the Rules and Regulations of their Council of Deliberation and their Valley.

It is expected that all officers shall be present at all business meetings of their Subordinate Body as well as at Reunions.

## **SUGGESTED PROCEDURES FOR ELECTION OF OFFICERS**

1. The Presiding Officer of each Body should appoint a Nominating Committee consisting of three or five members, sufficiently prior to the election to allow the committee to carefully consider the prospective officers for the ensuing term.
2. The Nominating Committee should present their recommendations at a regular stated meeting of the Body for consideration by the general membership in attendance.
3. After the report is presented, the Presiding Officer may ask, "Are there any further nominations?" If there is competition for any position, paper ballots should be used in the election.

Note: Article 330 of the Constitutions pertains to the election of presiding officers and reads as follows:

Art. 330 – "No one shall be elected as presiding officer who has not previously served in one of the first three offices of the same Body of the Rite, provided, however, that this requirement may be waived by the Deputy for the State."

4. If there is no competition for any positions, a motion would be in order empowering the Secretary or some other designated member to cast one ballot for the slate of officers as presented. If this motion is approved by a majority vote, the Secretary, or whoever is designated, should then cast the ballot and so report to the Presiding Officer. The Presiding Officer should then announce that the slate of officers has been duly elected.
5. The suggested procedure outlined above is subject to the by-laws of the Valley and rulings of the Deputy.

## IV. PROTOCOL

### DEFINITION

Protocol covers the more important details of ceremonial etiquette at Scottish Rite Functions, including the introduction and reception of distinguished guests, good form in the wearing of jewels and other decorations, the order of precedence in seating guests on the platform and at the banquet table, platform use of the Flag of the United States of America, flag etiquette, the National Anthem, and the Pledge of Allegiance.

### INTRODUCTION AND RECEPTION OF GUESTS

1. All distinguished visitors and guests should be officially received at the beginning of the meeting, if practicable. Late arrivals should be introduced at some convenient opportunity.
  - (a) A carefully chosen individual (not necessarily an officer) or a committee should be appointed by the Presiding Officer in advance to escort and introduce a senior distinguished guest or guests. Only one of the escorts should offer his right arm to the guest. Additional escorts, if any, should follow.
  - (b) A Guard of Honor equipped with swords should precede the escorting appointee or committee. There should be a Captain of the Guard or Master of Ceremonies who shall give all orders.
  - (c) The Guard of Honor will execute "Present Swords" when Honorary Members of a Supreme Council and all other guests are formally received, except as outlined in 4. below.
  - (d) The Guard of Honor will form an "Arch of Steel" for the reception of any Active Member or Active Emeritus Member of this or any Supreme Council, 33<sup>o</sup>, of the Ancient Accepted Scottish Rite in Amity with this jurisdiction. The only other guest entitled to this honor is the Grand Master of Masons in his own State.
  - (e) After welcoming the distinguished guest or guests, the Presiding Officer will cause the Grand Honors to be given to those entitled to such recognition. When the guest is the Deputy for the State or his representative, the Sovereign Grand Commander, or the Grand Master, the Presiding Officer should then tender his gavel to the guest and request that he preside over the deliberations of the Body.

NOTE: If the Deputy for the State is present, he should greet the Sovereign Grand Commander at the Altar, escort him to the East, call for the Grand Honors (the Battery of the Degree under which the Body is operating), present him to the Brethren, and tender him the gavel. If the Deputy, an Active Member for the State, or Deputies Representative for the Valley is not present, the Presiding Officer will observe the procedure as outlined above.

If the Sovereign Grand Commander has been received and the Grand Master of Masons or his representative is in waiting, it is the privilege of the Sovereign Grand Commander to

receive him. If a Grand Master, or any other distinguished guest, is not a Scottish Rite Mason, the Presiding Officer shall declare a recess, and resume when the guest has been escorted from the room.

2. If the Deputy for the State is present, he shall be asked for instructions as to protocol, and shall prescribe it after being informed of those present. In general, the procedure shall be as follows:
  - (a) If an Active Member of the Supreme Council resident in the Valley is present, he shall be received first and shall receive the Deputy, if present, who shall then proceed as he sees fit.
  - (b) If there is no Active Member of the Supreme Council resident in the Valley present, the Valley Deputy's Representative shall act. In the absence of both, the Deputy shall be received first, if present, and then shall proceed as he sees fit.
  - (c) If the Deputy is not present, the senior Active Member present who is resident in the State shall be received and proceed as he sees fit.
  - (d) If the Deputy or an Active Member is not present the Valley Deputy's Representative shall be received and proceed as he sees fit.
3. When distinguished guests are to be received formally, the order of precedence in the absence of other instructions shall be as follows:
  - (a) Active and Active Emeritus Members of the Supreme Council, including visiting Deputies and officers of the Supreme Council, other than the Sovereign Grand Commander
  - (b) Officers or representatives of:
    - (1) Related Masonic Bodies other than those named hereafter;
    - (2) Grand Chapter of Royal Arch Masons; Grand Council of Royal and Select Masters (Cryptic Masons); Grand Commandery of Knights Templar (General Grand Bodies in the same order);
    - (3) Foreign Supreme Councils other than English-speaking; National Grand Lodges of the Scandinavian Rite;
    - (4) Supreme Council of Prince Hall Freemasonry;
    - (5) English-speaking Supreme Councils (outside U.S.A.); Ireland, England, Scotland, Canada, Australia, New Zealand, Philippines, Finland; and
    - (6) Southern Jurisdiction, U.S.A.
  - (c) Other distinguished Masonic guests, including visiting Grand Masters
  - (d) The Sovereign Grand Commander
  - (e) The Grand Master of the State

4. Visitation by Sovereign Grand Commander – The Presiding Officer of Body is in chair (or Deputy, Active Member or Deputy’s Representative). After all guests, other than the Sovereign Grand Commander (and Grand Master of the State, if present) are seated:
  - (a) Captain of Guard or Master of Ceremonies announces presence of Sovereign Grand Commander in anteroom.
  - (b) A committee is appointed (usually all present and past Presiding Officers of Scottish Rite Bodies of the Valley visited and all 33° members present) with named Chairman.
  - (c) Committee retires under escort by Guard bearing swords.

Guard and Committee open ranks. Chairman passes through, followed by Committee and Guard, turning the procession inside out and leaving it, when about-faced, reversed and ready to re-enter. When within the auditorium, Guard opens ranks. Committee passes through. Guard forms Arch of Steel and Captain of Guard or Master of Ceremonies announces Sovereign Grand Commander; then Chairman escorts Sovereign Grand Commander through lines. Chairman presents Sovereign Grand Commander. Presiding Officer welcomes Sovereign Grand Commander and surrenders gavel to him. The Sovereign Grand Commander will then send the same Committee to escort and present the Grand Master of Masons of the State, or his personal representative.

5. On the occasion of an official visit to a Valley by the Deputy for the State or his representative, the Deputy may be escorted by Honorary Members of Supreme Council.
6. It is important that formal dignity be maintained. Introductions should be brief; no biographical data, no fulsome compliments. It is sufficient to say, “I have the honor to present” (Give name and Masonic title). Do not use cliché “present to you and through you.” In presenting the Sovereign Grand Commander, do not rehearse the full corporate title of the Jurisdiction used in the Official Declaration. “Ill.∴ \_\_\_\_\_, 33°, Sovereign Grand Commander,” is preferable.
7. In receiving a distinguished guest, never, under any circumstances, greet him by his first name. That intimacy is for private and unofficial conversation. It is proper to add a brief, friendly word of appreciation of the honor of the visit and an assurance of a sincere and hearty Masonic welcome.

NOTE: The formal ceremony of Reception may be waived at the request of a guest.

8. It is recommended that no speaker, regardless of Masonic rank, shall speak immediately following the conferring of a degree. The only exception should be for the senior or principal speaker.
9. At a dinner meeting or a Masonic gathering, other than one at which a degree is conferred, speeches other than that of the principal speaker shall be limited so that the program shall not become excessively long. Only the senior Masonic Officers present should be given the opportunity to speak. Other introductions should be held to a minimum, and group introductions used whenever possible. The program should end with the principal address.

10. When a guest speaker is invited to visit a Valley, the Committee in charge should advise him that the Valley will provide transportation and other expenses. Adequate hotel accommodations should be provided by the Valley or Council of Deliberation, if involved.
11. A universal fault with most banquets and meetings is their extended length; too many introductions and re-introductions, many of the same persons, not enough group presentations to reduce individual applause, and "word of greeting" expanded to a talk of several minutes. A good Master of Ceremonies or Presiding Officer can be of great benefit in controlling the program.
12. Common courtesy demands that a Valley arrange its program in a manner that provides a guest speaker with an audience that is not exhausted by extended proceedings prior to his introduction or by the lateness of the hour.

## **TABLE PROTOCOL**

The ranking Masonic Officer present should be seated on the right of the Presiding Officer and, next to him, the speaker of the evening. The next ranking officer is seated at the left of the Presiding Officer. All others, including distinguished guests, are placed in order, alternating right and left. Seating is facilitated when place cards are used. Chaplains should be seated at the head table. When ladies are present, they should not be placed at either end of the head table.

### **GRAND HONORS**

#### **LODGE OF PERFECTION**

XXX XXXXX XXXXXXXX XXX, XXX, XXX

3 – 5 – 7 – 9

#### **COUNCIL PRINCES OF JERUSALEM**

XXXX X

4 – 1

#### **CHAPTER OF ROSE CROIX**

XXXXXX X

6 – 1

#### **CONSISTORY**

X XXXX

1 – 4

## **THE FLAG OF THE UNITED STATES OF AMERICA**

Congress, by joint resolution (amended by public law 94-344, July 7, 1976), codified existing rules and customs pertaining to the display and use of the American Flag by civilian groups. Relevant sections applicable to Bodies of the Scottish Rite follow:

### **PROPER DISPLAY OF THE FLAG**

If displayed flat, the flag should be above and behind the speaker with the blue field in the left-hand corner as viewed by the audience. When displayed from a staff, it should be given the place of honor at the right of the speaker as he faces the audience. Other flags should be displayed at the speaker's left as he faces the audience.

### **FLAG ETIQUETTE**

When the flag is passing in a parade or review, all persons present should face the flag, stand at attention, and salute. Those present in uniform should render the military salute. When not in uniform, men should remove the headdress with the right hand, holding it at the left shoulder, the hand being over the heart. Men without hats should place their right hand over the heart. Foreign guests should stand at attention. Women should salute by placing their right hand over the heart. The salute to the flag in the moving column should be rendered at the moment the flag passes.

If a Scottish Rite hat or headdress is being worn, the hat or headdress should be removed with the right hand, holding it at the left shoulder, the hand being over the heart.

### **NATIONAL ANTHEM**

When the national anthem is played and the flag is not displayed, all present should stand and face toward the music. Those in uniform should salute at the first note of the anthem, retaining this position until the last note. All others should stand at attention, men removing the headdress. When the flag is displayed, all present should face the flag and salute.

*NOTE: For saluting etiquette, see preceding paragraphs.*

### **PLEDGE OF ALLEGIANCE**

The Pledge to the Flag has developed from the original, which was drawn up in August 1892, in the office of the Youth's Companion.

As revised by an Act of Congress in June 1954, the Pledge is as follows:

"I pledge allegiance to the flag of the United States of America and to the republic for which it stands; one nation under God, indivisible, with liberty and justice for all." *(There is no comma or pause after the word "nation.")*

NOTE: When giving the Pledge of Allegiance, everyone should stand, face the flag, remove headdress if worn, and place their right hand over the heart.

## THIRTY-THIRD DEGREE

Care should be exercised in the proper use of the term, "Thirty-third." Every member who receives this designation has been created an "Honorary Member of the Supreme Council, 33°." It is improper to use the term, "Honorary 33°." The proper term (title) is "Ill. .:, \_\_\_\_\_, 33°, Honorary Member of the Supreme Council.

Emeritus Member: The proper designation of a former Active Member of the Supreme Council is "Active Emeritus," (not Emeritus Active).

There is also a designation of Past Active Member for a retired Active who has not been granted the title of Active Emeritus.

## TITLES: CORRESPONDENCE

The title "Ill. ." or "Illustrious Brother" and the "33°" are significant only within the Scottish Rite Fraternity. They should **not** be used in addressing an envelope. Address as in ordinary correspondence.

In correspondence with an officer, Active Member, Active Emeritus Member or Honorary Member of the Supreme Council, it is proper to add his title in the salutation of the letter, but **not** on the envelope.

In the heading of a letter, one should use this form:

Ill. .: \_\_\_\_\_, 33°

(Title) \_\_\_\_\_,

and address him as

My dear Sovereign Grand Commander (Or whatever his title may be)

or

Illustrious and dear Brother \_\_\_\_\_

or

Dear Brother \_\_\_\_\_

## **V. DECORATIONS, MEDALS, and AWARDS**

### **DEFINITION**

Decorations are defined as follows:

- (a) Any Decoration adopted by authority of the Supreme Council, 33°, N.M.J., or by any other recognized Supreme Council including recognized Grand Lodges of the Swedish Rite.
- (b) Any Decoration adopted by authority of a regular Grand Lodge of Symbolic Freemasonry, such as a Past Master's jewel, or by authority of a subordinate Body.
- (c) Any Decoration expressly authorized by the laws of the United States of America, by one of its states, by the United Nations, or by some foreign government recognized by and at peace with the United States, or as expressly authorized by the Deputy for the State.

### **DECORATIONS TO BE WORN**

The Decorations described above are the only ones authorized to be worn in a Scottish Rite meeting, except that an officer or representative of an organization being officially received in the Supreme Council or in any of its subordinate Bodies, is entitled to wear the jewel and decoration of his organization.

### **HOW AND WHEN WORN**

The jewel of an Active or Active Emeritus Member of the Supreme Council is worn over the heart. No additional jewel or medal, other than the Supreme Council Medal of Honor or Gourgas medal, should be worn. The jewel of an Honorary Member is worn over the heart. One additional jewel may be placed to its left. No more than two Masonic jewels or decorations are to be worn at one time. Scottish Rite jewels are not worn in Bodies of Symbolic Freemasonry or of the York Rite unless being received in an official capacity.

Jewels or medals given for distinctive military or civic service by the government of the United States or one of its states may be worn on any occasion. This applies especially to various medals of honor and the Purple Heart. Military personnel, in uniform, are expected to display their decorations in accordance with military regulations.

### **MEDALS AND AWARDS**

Appreciation is a basic human need. When a person's efforts are recognized and valued by others, it enhances their desire to continue good work and inspires others to contribute. Scottish Rite, NMJ offers several opportunities to recognize its members for outstanding service through its Medals and Awards Program. Awards given to recognize outstanding achievement are a way to show a person that they are both appreciated and celebrated.

Though their appearances differ, one commonality amongst each of the Scottish Rite Medals & Awards is "Service." Distinguished service to Freemasonry, Country, and Humanity are all hallmarks and defining characteristics of the selfless service demonstrated by their respective recipients.



## VALLEY OF EXCELLENCE AWARD

The Valley of Excellence award is to recognize Valleys in the Scottish Rite, Northern Masonic Jurisdiction who go above and beyond in their endeavors. With focuses on areas of membership, service/philanthropy, leadership development, and operations, this program encourages Valleys to deliver a premier Scottish Rite experience. We want to highlight the best of the best with this award!

To compete for the Valley of Excellence award, Valleys will accomplish as much as possible from the scoring outline within the census year. The official date range of qualifying for this award every year is June 16 to June 15 of the following year.

This document will overview the scoring method used to compete for the Valley of Excellence award. This outline was built on a scaling method which will scale automatically with the size of your Valley. Please note, it is not possible to receive “extra credit or points” for any category.

To become a “Valley of Excellence” a score of 90% will need to be obtained. If a Valley reaches the pinnacle success point of 90%, they will be allotted an additional 33<sup>rd</sup> nomination as a special incentive.

The Valley of Excellence award is broken down into four key areas that add up to 100% overall. These four key areas are broken down into subcategories with their own percentages that make up the key area’s total percentage. Below is an outline of the scoring card for the Valley of Excellence. After the outline is a breakdown of each section to give information on each category and subcategory.

### 1. Membership (50%)

- Recruitment - 20%
- Engagement - 20%
- Restoration & Preservation - 10%

### 2. Service and Philanthropy (25%)

- Service Events - 5%
- Widows Programs - 5%
- Almoners Fund - 5%
- Champion a Charity - 5%
- Blue Envelope - 5%

### 3. Leadership Development (15%)

- State Participation - 5%
- Membership Education - 5%
- Mentoring Program - 5%

### 4. Operations (10%)

- Finances - 2%
- 990/Annual Report - 2%
- Presiding Officers - 2%
- New Member Registration - 2%
- Communications - 2%

## **1. Membership – 50%**

**For the Membership category, there is partial credit for subcategories. Points will scale accordingly based on the amount achieved in that category.**

Membership is the lifeblood of the Scottish Rite, Northern Masonic Jurisdiction. It is what drives our programs and experience in our Valleys. Therefore, it is evident that the Membership category makes up the largest percent of the Valley of Excellence award. This area is divided up into the three key areas of membership recruitment, membership engagement, and membership restoration and preservation.

### **1a. Recruitment – 20%**

The Presiding Officers of the Valley and Membership Committee will work together to set a membership recruitment goal for the year. The baseline for this goal will be the Valley's average new members recruited over the past 5 years. The Valley may not set their goal under this baseline. ***This baseline will be the goal if the Valley has no goal established.***

The goal will be reported to the Membership Team at Supreme Council, where it will be reviewed with the Valley. Once this goal is set, the Valley will achieve their goal to receive full points for recruitment.

To receive partial credit, the Valley will achieve at least half of this goal. The partial credit will be adjusted accordingly to the number recruited.

***The deadline for Valleys to set their recruitment goal for the year is September 1. This cannot be changed after this date.***

### **1b. Engagement – 20%**

To earn credit for the Engagement subcategory, the Valley will need to do the following: Each section of this subcategory adds up to the overall 20%.

- **Host min. 2 Reunions – 4%**
- **Host min. 12 Family Life/Brotherhood events – 4%**
- **Host min. 4 “Rite on the Road” events (Initiations, lodge showcases, etc.) – 4%**
- **Host min. 2 New Member orientations – 4%**
- **Contact min. 20% of total membership for Brother to Brother program – 4%**

This is shown on the score card on the examples on pg. 9-11 as **20 events / 20% total membership for B2B contact**. This category will be reported by the Valley on the Annual Report concluding the Census Year.

### **1c. Restoration & Preservation – 10%**

The Valley will restore ***at least 7% of their NPD suspended members from over the past 5 years*** and must finish the year with ***less than 5% losses (excluding deaths)***.

## **2. Service and Philanthropy – 25%**

**For the Service and Philanthropy category, there is partial credit for subcategories. Points will scale accordingly based on the amount achieved in that category.**

The service and philanthropy initiatives at the Scottish Rite, NMJ is how we change lives, together. This area is divided into subcategories of service hours, service events, and donations to charitable programs.

### **2a. Service Events – 5%**

The Valley will organize, host, and implement **6 or more service events per year** and report on the Annual Report how many members present, and total service hours completed for each event.

### **2b. Widows Programs – 5%**

**At least twice annually**, communicate and/or host an event for widows and/or their families; share your stories with Supreme Council in your Annual Report.

### **2c. Almoners Fund – 5%**

The Valley will annually donate at least \$2 per member to the Supreme Council Grand Almoner's Fund. This donation is Valley-based and donated on behalf of your members. This category will be calculated by Supreme Council at the conclusion of the Census Year.

### **2d. "Champion a Charity" – 5%**

The Valley may select a charity of their choice to "champion" and support. They will annually donate **at least \$2 per member** to this charity. **The Scottish Rite, NMJ encourages this to be the Valley's local Children's Dyslexia Center if the Valley has one.** These donations are Valley based and donated on behalf of your members. This category will be reported by the Valley on the Annual Report concluding the Census Year.

### **2e. Blue Envelope – 5%**

To accomplish credit for this subcategory, the Valley will have **at least 7.5%** or more total members donate to the Blue Envelope. This category will be calculated by Supreme Council at the conclusion of the Census Year.

## **3. Leadership Development – 15%**

**For the Leadership Development category, there is partial credit for subcategories. Points will scale accordingly based on the amount achieved in that category.**

We must constantly develop the leadership skills of our members in order to maintain a successful Scottish Rite program. This area is divided into subcategories of state participation, membership education, and mentoring programs.

**3a. State Participation – 5%**

The Valley will have a *minimum of 4 members* participate in a Council of Deliberation or other state meeting.

**3b. Membership Education – 5%**

The Valley will have *at least 5% of their membership* attend a local, regional, or NMJ sponsored membership seminar per year.

**3c. Mentoring Program – 5%**

The Valley will host *one mentoring program* within the year. Examples of a mentoring program include new member orientation, new presiding officer's workshop, etc.

**4. Operations – 10%**

**For the Operations category, there is NO partial credit for subcategories. You need to fulfill what is required to receive points for that subcategory.**

It is vital that our Valleys are completing all required administrative tasks and operations in order to effectively run.

**4a. Finances – 2%**

The Valley will annually complete their per capita, budget, and insurance on time. No late payments unless otherwise approved by the Sovereign Grand Commander. This category will be calculated by Supreme Council at the conclusion of the Census Year.

**4b. 990/Annual Report – 2%**

The Valley will annually complete and submit their 990 and annual report. This category will be calculated by Supreme Council at the conclusion of the Census Year.

**4c. Presiding Officers – 2%**

The Valley will annually submit their presiding officer information using the online form. This includes officers who are serving multiple years/terms. This category will be calculated by Supreme Council at the conclusion of the Census Year.

**4d. New Member Registration – 2%**

The Valley should, on average register 4° (Lodge of Perfection) new members within 10 days. This will be calculated by Supreme Council at the conclusion of the Census Year.

**4e. Communications – 2%**

The Valley will send at least 20 communications to their members every year. Social media accounts count as one specific unit of communication. For instance, having a Facebook page is one unit of communication for the year, having a Twitter account is one unit of communication for the year, etc. This category will be reported by the Valley on the Annual Report concluding the Census Year.

## **VI. RITUALS**

### **CUSTODIAN OF RITUALS**

The Constitutions provide that the Secretary of Scottish Rite Bodies in each Valley is the custodian of Rituals under the direction and supervision of the Supreme Council. He is entitled to prompt officer cooperation in the maintenance, dissemination, and protection of Ritual scripts and information. It is essential that one complete set of Rituals be kept on file in the office of the Secretary at all times.

Each Ritual, Book of Forms and Ceremonials, Constitutions, or any other book or document belonging to the Supreme Council received by any officer, degree worker, or member is their personal responsibility according to our Constitution. Under no circumstance should any such item in your possession be provided to anyone who is not a member in good standing having present need for them and in whom you trust to maintain its security. It should also be carefully safeguarded against accidental dissemination, discovery, or theft to or by those not entitled to have or view them. It is best practices to password protect electronic copies (or the electronic devices upon which they are stored) and only transmit them to others entitled when you are confident that they are not subject to such transgressions on the receiving end. If you are sending or receiving such documents, exercise the same caution and circumspection as you would treat your highly personal information. In printed form, take caution to again secure against transgressions by keeping the documents with your person and placing them in a secure place when they are not being used.

Always remember that the office of the Secretary of the Valley is able to issue scripts and documents for good cause. Should you have any concerns, simply refer the requester to the Secretary for further assistance.

Once you are done with the present use or need for the script or document, please delete or destroy it to prevent any future transgression. You can always rest assured that the Secretary will have another copy for you should you have cause to request a copy. Encourage your fellows to do the same as it will protect the Ritual, fraternal governance, and our work product from improper dissemination and theft.

### **INNOVATIONS IN RITUAL**

The integrity of the Ritual structure is of vital significance because the philosophy of the Scottish Rite, its historic message, Core Values, and its practical lessons are dramatized in its Rituals. It is the duty of the Officers to guarantee the integrity of the Ritual structure by guarding it from unauthorized changes. All Officers must, therefore, know the Rituals for which they are morally and legally responsible.

Subordinate Bodies are prohibited from conferring degrees, except in conformity with the Constitutions and Rituals authorized by the Supreme Council. "The Deputy for the State may suspend from office the officer of any Subordinate Body who shall use, or cause to be used, any unauthorized ritual of any degree of the Rite."

These Constitutional provisions define the responsibility of Officers for guarding against unauthorized innovations in the Ritual. Liberty is granted to Valleys to adapt suggested setting changes, costumes, and dramatic action to local conditions or casting necessities; but significant omissions, innovations, and changes in Ritual text, presentation or sequence are not permitted, unless approved by the Deputy for the State. Approval by the Deputy is considered temporary and not an amendment to the approved Ritual. Presentation of outdated, retired degrees that have not been given “play” status by the Supreme Council’s Committee on Ritualistic Affairs is permitted for member-only education and entertainment with the approval of the Deputy for the State and in accord with the rules regarding the presentation of approved degrees. The presentation of outdated, retired degrees does not qualify the viewer to have his passport stamped for that degree.

The use of costumes, stage settings, and paraphernalia belonging to a Valley is governed by the Constitutions, which read as follows;

“With the approval of the Sovereign Grand Commander or the Deputy for the State, costumes, stage settings, and other paraphernalia belonging to a Valley may be used in the presentation of plays or other entertainments, whether open to the public or not, sponsored or permitted by the Valley, and may be photographed for publicity purposes, provided, however, that the degree or ritualistic use of such items shall not be disclosed and that no costume or degree character representing a member of the clergy may be so used without the specific approval of the Sovereign Grand Commander.” (Book of Constitutions – Art. 603-2.)

The Sovereign Grand Commander has approved the taking, sharing, and posting of member-taken photographs on social media or sharing such with non-members for non-commercial purposes provided, however, that the degree or ritualistic use of such items shall not be disclosed and that no costume or degree character representing a member of the clergy may be so used without the specific approval of the Sovereign Grand Commander.

Videotaping of degrees for training and critique purposes or for evaluation at the direction of the Supreme Council Committee on Ritualistic Affairs is not permitted without the written approval of the Deputy for the State and then with strict requirements. (See Book of Constitutions—Art. 603-3 for specific requirements.) Other videotaping of degrees is prohibited without approval of the Sovereign Grand Commander and any such videos are not permitted to be shown for degree experience or stamping of passports.

The Committee on Ritualistic Matters encourages any officer of the Rite who has an innovation or revision he would like to have incorporated in any Degree or a proposal for a new degree script to submit his proposal in writing to the Chairman of the Committee with a copy to the Deputy of his State. Submission constitutes a full and complete waiver of any copyright or proprietary interest in the same.

## **RITUAL PROGRAM**

The Ritual of the degrees has always been the heart and soul of the Rite. No single phase of Scottish Rite has received more attention than the degree structure, and each degree is under constant study in an attempt to assure a modern, dynamic presentation of the philosophy of the Rite.

There are 29 Scottish Rite degrees, 4° - 32°, inclusive, which may be conferred by a Valley. The number of degrees witnessed by each Class becomes a matter of importance. Ritualistic programs should be studied with care so that a maximum number of degrees may be exemplified. Each Valley should exemplify all the degrees, for which they are responsible, within a six-year period. Mandatory degrees in each Body are provided by the Constitutions (Book of Constitutions – Art. 516), which is paraphrased as follows:

1. Lodges of Perfection shall exemplify the Fourth Degree before any other degree is presented to the Candidate. Upon witnessing the entire Fourth Degree, the Candidate is a Member. Before the Member may witness the Thirty-second Degree and become a 32° Scottish Rite Mason, the member must have witnessed, in full, a minimum of three other degrees exemplifying the Core Values of the Scottish Rite, Northern Masonic Jurisdiction.

## **USE OF AN EXEMPLAR IN DEGREE PRESENTATIONS**

An Exemplar, representing the Class may, on behalf of the Candidates, assume the Obligation in any Degree of the Scottish Rite in which one exists. (This does not apply to the Cover Obligation given at the beginning of Degree presentations). When an Exemplar is used, the following affirmation of consent must be given:

“Do you and each of you consent that in the degrees about to be conferred upon you, an Exemplar shall be chosen to represent you, to speak for you when necessary, to answer for you such questions as you may not be able to answer for your-selves, to assume for you the necessary vows, and that such answers made, engagements entered into, and vows assumed, will be by you understood and accepted as your own answers, promises and vows?”

Upon receiving an affirmative answer, the Master of Ceremonies will, at the appropriate time, place the candidate at the altar to assume the obligation contained in that degree. All candidates stand under the Sign of Fidelity during the conferral of such. (The sign is given by placing the right hand over the heart, fingers and thumb extended but together.)

## **RECOMMENDATIONS FOR CASTING**

The need for workers in all areas of Scottish Rite Freemasonry is great, and the recruitment of qualified men presents a wonderful opportunity to stimulate interest in the Valley. The following suggestions may be helpful in casting.

1. A Casting Committee serving all concordant bodies of the Valley should be used to facilitate increased membership participation and contact. Casting contacts along with their record of participation should be maintained by the committee and a current copy kept with the secretary of the Valley

2. Complete questionnaires from all new members should be obtained in order to determine their skills, availability and interests. Similar questionnaires should be obtained periodically from those who are already members.
3. Alternate casts should be developed and used.
4. Degree workers should not be retained too long in the same part. This refers particularly to the major characters. Best practices suggest that a rotation of major characters be developed, if possible, to secure against emergencies.
5. Critique Committees should be used after degree exemplification to evaluate and improve results.
6. Actors portraying minor characters should be encouraged by stressing their importance in the complete success of the exemplification of the degree.
7. Physical requirements are important. Fit the man to the character and assist him to “be” the part.
8. Programs of dramatic and speech training should be instituted and maintained.
9. Mistakes in casting should be corrected as soon as possible.
10. Sincerity of effort and enthusiasm are essential qualifications for a successful degree worker.
11. Attendance at rehearsals is absolutely necessary and a commitment by the cast member should be received beforehand. This requires the director to have the practice dates scheduled BEFORE selecting the cast so such commitment may be made by the cast member. Preparation of these dates and casting absolutely needs to begin at least six months in advance of the performance date to respect the time of our cast members and prepare for any emergencies that may arise.

## **REGALIA, COSTUMES AND PARAPHERNALIA**

Consult the “Regalia” section of the Constitutions for information concerning the Scottish Rite emblems, jewels, chain collars, caps, and Consistory uniforms.

Costumes, properties, and stage settings are suggested, in general terms, in the Director’s notes in the Ritual of each Degree. The Manual for Directors of Work will also prove helpful.



## **VII. DECLARATION OF PRINCIPLES AND PROCLAMATIONS OF LABOR AND FREQUENCY OF DEGREE PRESENTATIONS**

### **DECLARATION OF PRINCIPLES**

The Declaration of Principles found in Article 105 of the Constitutions is required to be read to every Candidate before he takes his first degree of the Rite.

### **OPENING AND CLOSING PROCLAMATIONS**

“Except as provided by Article 333-2 as to meetings open to non-members, Subordinate Bodies of a Valley or Valleys when meeting separately or jointly, as the case may be, shall open and close their work with the following Declaration.

“To the glory of the Grand Architect of the Universe, in the name and under the auspices of the Supreme Council of Sovereign Grand Inspectors General of the Thirty-third and last Degree of the Ancient Accepted Scottish Rite of Freemasonry for the Northern Masonic Jurisdiction of the United States of America, and by virtue of the authority upon me conferred, I declare the works of *(here mention the name of the Valley or Valleys)* opened *(or closed, as the case may be).*”

### **DELEGATION OF AUTHORITY**

A duly qualified officer of a Subordinate Body with authority to declare the works of that Body open or closed may delegate such authority to a duly qualified officer of the same or another Subordinate Body, or to the Deputy’s Representative, of the same or another Valley, or to an Active Member of this Supreme Council.

### **SIX-YEAR RULE**

The Presiding Officers are expected to urge the members of every Class to return, from time to time, to witness the exemplification of degrees they have not seen or join with their Brothers to experience degrees again. In keeping with that policy, the Valley is expected to present each of the degrees within their responsibility at least once every six years.

## VIII. MUSIC IN THE RITE

Music, “the universal language of mankind,” is a means to an end in degree portrayal. It should serve to sharpen the image of the lesson being taught and provide the atmosphere or mood, which helps the drama to come alive. Also, music associated with important personal events can trigger memories of the experience connected to the music.

It can add another dimension to the story being told or expressed in action. It can stir the current of history, heightening the color of the scene. To be effective, music must say the right thing in the right place at the right time.

Universality is a basic principle of the Scottish Rite. Consequently, care must be taken that the music used in degree exemplification is not identified exclusively with a particular form of divine worship and that it is not offensive to a particular creed.

Ritualistic music should relate to the historical period, to the moral teaching and to the total concept of the degree. Unity should be sought and maintained.

In many of the rituals, musical selections are recommended, often with optional titles listed. For those degrees that do not indicate specific titles, Valleys should feel free to be creative while using their best judgement in selecting music that is appropriate to the spirit of the degree(s).

It is recommended that the musical program be selected in a conference that includes the Presiding Officers of the Scottish Rite Bodies, the director of work, the organist, and the choral director.

## IX. CHARITIES

Embedded within the core values of Scottish Rite Freemasonry you find a clear commitment to charity and service. These values have been spelled out not only through the degree work that we exemplify, but through our commitment to our own philanthropic endeavors. Over the years, the Scottish Rite, NMJ has worked to build its charitable footprint in order to help make an impact in our communities. This effort has resulted in the four philanthropic pursuits to which we dedicate our time and resources.

### OUR CHARITIES

#### *Grand Almoner's Fund*

The Grand Almoner's Fund is central to the Scottish Rite's vision to care for our members, providing assistance to Masons and their families facing unexpected hardships. Whether its rebuilding after a natural disaster or facing the mounting costs of cancer treatments, our Brothers have been lifted out of some of life's most difficult moments thanks to the Grand Almoner's Fund. For members young and old, for the sick, unemployed, grieving, or those facing catastrophe, the Grand Almoner's Fund is there to help our own when they need it most.

#### *Children's Dyslexia Centers*

One of the Scottish Rite's most widely supported charities, the Children's Dyslexia Centers have been changing the lives of children since 1994. Our more than 40 locations in 13 states have opened doors for more than 13,000 children facing the devastating effects of dyslexia. To serve more children, our accredited training courses are equipping thousands of local educators with the tools they need to help children learn and reach their full potential.

Students leave our program with their confidence and self-esteem restored, ready to successfully meet the literacy demands in school and their future careers. The positive impact of early intervention on the lives of these children and their families is enormous and inspires our commitment to this program.

#### *Leon M. Abbott Scholarship Fund*

Since 1951, the Leon M. Abbott Scholarship Fund has awarded more than \$10 million to students looking to further their education. One of Freemasonry's fundamental principles is the belief in the importance of the educated mind, and the Scottish Rite is committed to fostering the value of education through the Abbott Scholarship Program. Each year, hundreds of scholarships are awarded to eligible and deserving students attending accredited colleges, universities, and specialty schools.

### *Masonic Museum and Library*

Established in 1975, the Scottish Rite Masonic Museum & Library tells the story of Freemasonry and fraternalism in the context of American history. From scholarly research, to outstanding collections, program and exhibitions, the Museum strives to be the historical society for American Freemasonry. The Museum continues to collect objects, books and documents and serves as an embodiment of the Scottish Rite's commitment to preserve the rich history of our fraternity and our nation for generations to come.

### *Membership Education Fund*

The Membership Education Fund is accompanied annually with the Masonic Education Fund appeal. This program helps put on member retention and recruitment programs that assist in educating Brothers on degrees, expand on the first-year membership education plans, provide membership milestone updates and supports the 50-year membership coin program. As of 2018, donations to the Membership Education Fund are now tax deductible to the fullest extent allowable.

## **THE BLUE ENVELOPE**

These philanthropic efforts are supported by an annual letter campaign directed toward all of our members. This appeal, named the Blue Envelope, was created to give our members and friends the opportunity to support the charitable endeavors of their fraternity in an easy and convenient way. Over the years, support from our members and Valleys has been incredibly important in our effort to raise money for these important causes.

This appeal gives a yearly opportunity for you to reach out to your members and encourage them to give if they are able. With the participation from your Valley directly impacting the amount of money available for Abbott Scholarships, any effort to encourage participation could have a positive impact for your membership.

## **HAVE QUESTIONS? REACH OUT**

If you or a member of your valley has any questions regarding any of our charities, please reach out to our development office located at Scottish Rite Headquarters in Lexington Massachusetts:

**(781) 465-3326**

**[Development@SRNMJ.org](mailto:Development@SRNMJ.org)**

**Scottish Rite Charities  
33 Marrett Road  
Lexington, MA 02421**

## X. STRATEGIC PLANNING

### INTRODUCTION

In today's competitive marketplace, all major corporations, whether for profit or charitable, must operate from the vision of a flexible, dynamic strategic plan. The Supreme Council adopted its strategic plan in 1995 and has mandated that each Council of Deliberation and Valley throughout the Northern Masonic Jurisdiction develop and implement a set of strategies necessary to meet and progressively integrate the challenges and rapid changes expected in the coming years.

These strategic plans are designed to set in place at all levels of the Valley organization, mechanisms, structure, and programs necessary to support its fundamental purpose, which is to continue its growth, harmony, and preeminence as an attractive, well re-cognized, and relevant Masonic-based fraternity within the Scottish Rite Northern Jurisdiction.

Through strategic planning and implementation, the Valley can aggressively continue as an organization that is effectively managed by highly motivated men with vision and leadership skills, which is attractive to men of good character, well understood, and embraced by the family, and which, through financial independence, ultimately makes a positive impact on quality of life while reinforcing high moral values in a global society.

The strategic planning process is not a complex one and can be completed in three or four 3-hour planning sessions. Sufficient time should be allowed between sessions for the facilitator to assimilate the results of the exercises and conclusions drawn from discussion, into drafts, used for further discussion, consensus, and closure at following sessions.

Usually, once the major goals of the plan are developed, the planning team can be broken down into smaller groups that are given the responsibility to develop and present potential plan objectives to the team for discussion and final inclusion within the plan. It is imperative that the planning team *unanimously* approves every goal and objective that becomes part of the final plan document. There is a strong need for team play and consensus building through discussion and agreement.

Once the plan is written and adopted by the officers of the Valley, it must then be implemented, and constantly monitored to assure that the plan objectives are prioritized and assigned to specific action teams.

Action plans must be written for each plan objective. The action plan sets out the methods, resources, and rough timeline necessary to complete the objective. When writing plan objectives, remember that they must easily convert into specific action plans; otherwise, they are usually too general, lofty, or unrealistic for inclusion in the plan.

In summary, the Valley Strategic Plan is designed to be the one document that speaks for the Valley membership as a whole. Through the implementation of its integrated strategies, Supreme Council expects to more fully meet the long-term fraternal needs and expectations of its member, and, by so doing, will affirm within the community at large that *"32<sup>nd</sup> Degree Masons make a difference"* as a force for good in today's society.

## GENERAL ROADMAP OF STRATEGIC PLANNING

### 1. Organize the Planning Team

- Balance (7-9 people is usually optimum)
- Vision and openness to progressive change
- Sense of team play
- Commitment to see the process completed

### 2. Designate a Facilitator

Someone has to take charge of the process. The facilitator is responsible for:

- a) making sure that the plan is completed on schedule;
- b) conducting the exercises and assimilating the results;
- c) writing the drafts and presentations;
- d) keeping a tight timeclock during the planning sessions to avert diversions and to keep the Committee focused at all times; and
- e) bringing closure to issues whenever possible without asserting personal pressure or influence on decisions.

The facilitator may be a member of the Planning Committee, may share his views and vote on issues, but always maintains complete objectivity.

### 3. Build a Perfect World (Exercise #1 – each member writes his own vision)

Assuming the best possible situation (forget about reality for the moment), write down your description of perfection “internally” and “externally” (e.g. many new members, abundant leadership, the community understands the purpose and value of 32° Masonry, etc.).

- Internally – the best “inside the Valley” vision (15 min)
- Externally – the best “image and partnership within the community” vision (15 min)

### 4. Compare the “Perfect World” with where the Valley is now

Develop lists of strengths and weaknesses

Group both the strengths and weaknesses into arenas:

- governance
- organizational growth
- leadership
- financial issues
- marketing/image building
- community relations
- family involvement
- intra-fraternalism

## **5. 1<sup>st</sup> Draft of a Mission Statement (Exercise #2)**

Each person makes a list of one-word adjectives and nouns that become the important identity and action words (e.g. fraternity, worldwide, premier, leadership, relevant, attractive, charity, family, inspire, etc.).

Massage these key words (particularly those that show up on several lists) into a rough 1<sup>st</sup> draft (between sessions) for presentation at the next session.

## **6. Determine the Major Goals of the Plan**

Refer back to the arenas developed in #3 above, and condense or expand to about 7 or 8 goal statements (lofty statements that will rarely change in the plan over time)... \*\*See Section III below.

## **7. 2<sup>nd</sup> Draft of the Mission Statement**

- Present the 1<sup>st</sup> Draft and make adjustments
- Bring closure to whatever is unanimously acceptable
- Accept all ideas about what is still missing or not 100% accurate
- Take no pride of authorship (don't be inflexible)

## **8. Develop Plan Objectives**

From the list of weaknesses developed in step #3, draft a list of objectives (to reduce or eliminate those weaknesses) under each major goal. Each objective must be worded so that it later becomes an Action Plan (or Tactical Plan) that can be assigned to a person, Committee, Task Force, etc., hopefully to be accomplished in a reasonable length of time. They must be realistic, affordable, and measurable, and will be monitored by the Planning Committee in the future, to assure that the objective is reached.

## **9. Finalize the Mission Statement**

## **10. Write an Introductory (or Vision) Statement for the Plan**

This is a page in the plan that gives the reader a clear understanding of the purpose of the organization and the vision for its future. It may also include a bit of historical overview to establish its credentials, long-term traditions and accomplishments.

## **11. Vote Plan Approval**

- Strategic Planning Team (unanimous approval required)
- Executive Board or Committee

## 12. Set the Plan in Motion

- Prioritize the plan objectives to determine which are critical
- Assign each objective to an Action Planning Team, charged to develop and implement a plan to achieve the objective within a reasonable time period.

## 13. Monitor Plan Results

The Plan must be monitored at least twice a year to assure that it is kept current, dynamic, and that the objectives are being addressed and completed within a reasonable time period.

- Once in the late Fall – a complete rewrite for adoption by the executive board or committee each calendar year. Objectives are updated or removed when completed, and new objectives are added and prioritized.
- Once in the late Spring – a progress report to determine the status of each plan objective, to assure that the Action Plan is moving forward toward completion as anticipated.

## MAJOR GOALS OF THE SUPREME COUNCIL STRATEGIC PLAN

To assure that all Valley and Council strategies interlock with the Supreme Council strategic plan, it is suggested that the Valley and Council strategic planning teams adopt the goals listed above and then develop specific Valley and Council objectives under each one.

In addition, it is suggested that copies of the current *Supreme Council Strategic Plan* be obtained as a reference and guide for the planning team. Copies can be sent by fax or email. The office phone number is 1-800-814-1432.

The *Supreme Council Strategic Plan* includes the following major goals:

- Be attractive and relevant to Masonic Brethren;
- Build closer working relationships with Grand Lodges and other Masonic-based organizations;
- Be an organization that is managed effectively;
- Be led by men with leadership skills;
- Be recognized as a fraternal organization committed to charity;
- Be active in the community at large;
- Be endorsed by the entire family;
- Be financially strong to accomplish the long-range mission.



## **XI. MISCELLANEOUS ITEMS**

### **SIGNIFICANCE OF THE ∴:**

This symbol is called “the three dots,” “triangle period,” or, more accurately, “triple period.” It came into use prior to the year 1800. It is shaped like a delta, a symbol of the Scottish Rite, and is used after abbreviations which belong to the Rite – as

A.:A.:S.:R.: and Ill.∴ for Illustrious.

When using this symbol, it should be written:

Ill.∴ John A. Smith, 33<sup>o</sup>, or

Ill.∴ Brother Smith

### **RINGS**

The official ceremonial rings are those of the Fourteenth and Thirty-third Degrees. These should be worn with the apex of the triangle toward the fingertips.

The Constitutions provide that “a Sublime Prince of the Royal Secret is authorized to wear a ring, the basic design of which shall be the double-headed eagle.”

The Supreme Council does not recognize the existence of a Thirty-third-Degree ring for ladies and discourages such use.

### **CAPS**

#### **Thirty-Third Degree Active Member**

The Active Member cap shall be of a circular style, with soft crown, about three and one-half inches high, made of heavy purple grosgrain silk. The complete description and specifications appear in the Constitutions.

#### **Thirty-Third Degree - Honorary Member**

Specifications are the same as for Active Member except that it shall be made of heavy white grosgrain silk, with band of white silk velour without embroidery of laurel vine, and except that the double-headed eagle shall have the wings outspread and pointing downward.

#### **Meritorious Service Award**

Specifications are the same as for Honorary Member except that rayon braid is used instead of velour and the color shall be red and in place of “33” in the Triangle there shall be the letters “M.S.A.”

## **Officers and Past Presiding Officers of Subordinate Bodies**

Specifications are the same as for Honorary Member except that rayon braid is used instead of velour and the color shall be gold, and in place of the Triangle and "33" there will be:

- In the case of Consistory officers, a double-headed eagle;
- In the case of Chapter officers, a cross and rose;
- In the case of Council officers, a balance; and
- In the case of Lodge officers, a simple triangle.

## **Service Groups**

Specifications are the same as for Honorary Member except that rayon braid be used instead of velour and the color shall be light blue, and in the place of the Triangle and the "33" there be a designation of the group: e.g., Choir, Guard, Marshal, etc.

## **Sublime Prince of the Royal Secret**

Specifications are the same as for Honorary Member except that rayon braid is used instead of velour and the color shall be black and in place of the Triangle and "33" there shall be a double-headed eagle and "32".

## **PROTOCOL**

Caps should be removed during prayers, the National Anthem, and the Pledge of Allegiance. The wearing of caps shall be optional, and each Valley shall determine for itself whether caps shall be worn. However, if caps are worn, they shall conform to the specifications set forth in the Constitutions.

## **FUNERAL SERVICE**

The Supreme Council has no authorized funeral service.

## **THE DOUBLE-HEADED EAGLE**

"The Double-Headed Eagle of Lagash is the oldest Royal Crest in the world. No heraldic bearing and no emblematic device of today can boast of such antiquity. It was in use a thousand years before the Exodus from Egypt and more than 2,000 years before the building of King Solomon's Temple."

"As time rolled on, it passed from the Sumerians to the men of Akkad, from the men of Akkad to the Hittites, from the Denizens of Asia Minor to the Seljukian Sultans from whom it was brought by the Crusaders to the Emperors of the East and West, whose successors were the Hapsburgs and the Romanoffs."

“This historical statement by William John Chetwode Crawley, distinguished Irish scholar, historian, and Freemason (1844-1915) was published in the 1911 Transactions of Ars Quatuor Coronati Lodge No. 2076 of London (Vol. 24, pp. 21-24). It was based upon records of archaeological researches by the eminent Assyriologist, M. Tureau-Cangin, whose excavations in Telloh – the ancient Lagash – brought to light the Storm-Bird, which is now the emblem of the Scottish Rite. The Lagash records are in the Louvre in Paris (Zeitschrift fur Assyriologie, 1904).”

“In more recent excavations, the city emblem of Lagash was disclosed also as a lion-headed eagle sinking his claws into the bodies of two lions standing back-to-back. This is evidently a variant of the other eagle symbol (Everyday Life in Ancient Times, 1951, pp. 34-35).

“The city of Lagash in Sumer in southern Babylonia, between the Euphrates and the Tigris and near the modern Shatra in Iraq, had a calendar of twelve lunar months, a system of weights and measures, a banking and accounting system and was a center of art, literature, military, and political power 5,000 years before Christ.

“In 102 B.C., the Roman Consul Marius decreed that the eagle be displayed as a symbol of imperial Rome. Later, as a world power, Rome used the double-headed eagle, one head facing East and the other facing West, symbolizing the universality and unity of the Empire. The Emperors of the Holy Roman Empire continued its use.

“So far as is known, the double-headed eagle was first used in Freemasonry in 1758 by a masonic body in Paris, the Emperors of the East and West. During a brief period, the Masonic Emperors of the East and West controlled the advanced degrees then in use and became a precursor of the Ancient Accepted Scottish Rite“(Appendix to Constitutions).

## LATIN PHRASES

The following commonly used Latin phrases should be familiar to Scottish Rite Masons:

“Deus Meumque jus” – God and my Right  
(*Day-oose May-um-queh Yoose*)

This motto of the Thirty-third Degree which is engraved in the ceremonial ring, is a Latin translation of the French ‘Dieu et mon Droit’, which means “God and my Right”. The legend of its origin is of interest. Richard I, King of England from 1189 to 1199, was known as Richard Coeur de Lion—the Lion-Hearted. He spent less than ten months of his ten-year reign in England because of his interest in the Crusades and his war with France. In 1198, Richard besieged the city of Gisors in Normandy. He issued to his troops as a battle cry the words “Dieu et mon Droit” because Gisors, captured by Philip Augustus of France, really belonged to England. Richard claimed it as “my Right” since he was fighting for his own. He won a great victory, in memory of which England placed the words “Dieu et mon Droit” on the Royal Coat of Arms.

“Spes Mea in Deo Est” – My Hope is in God.  
(*Space May-ah in Day-o Est*)

“Laus Deo Custos Arcani” – God, Keeper (or Custodian) of the Heavenly Secrets.  
(*Louse Day-o Coo-stos Ar-cah-nee*)

“Laborare Est Orare” – To Work is to Worship.  
(*Lah-bow-rah-ray Est O-rah-ray*)

“Ordo ab Chao” – Order out of Chaos.  
(*Or-dough ahb Kah-o*)

“Virtus junxit Mors non Separabit” –  
Whom Virtue Unites, Death cannot Separate.  
(*Weer-toos Young-sit Morz non Say-pah-rah-bit*)

“Ne Varietur” – Not to be changed.  
(*Nay Wah-ree-ay ture*)

“Ad Universi Terrarum Orbis Summi Architecti Gloriam” –  
To the Glory of the Grand Architect of the Universe.  
(*Ahd U-nee-wehr-see Ter-rah-rum Orbis Soo-me Ar-key-teck-tee Glo-ree-ahm*)

## SYMBOLS USED WITH SIGNATURES



Sovereign Grand Commander



Active Member



Thirty-third Degree



Thirty-second Degree



This symbol sometimes follows a signature of the Sovereign Grand Commander, an Active Member, or a Thirty-third Degree Mason.

## **XII. SOCIAL MEDIA PROTOCOL AND BEHAVIOR**

Social media is a way for members to communicate with friends and Brothers in a very personal way. It is a highlight reel of your life. There are a few simple common-sense things you should think about when using this platform of communication.

1. If you post a Masonic Symbol on your profile or post any Masonic material, Freemasonry will be judged by any future content you post.
2. Use Masonic location tags and hashtags thoughtfully. The public can find these locations and tags to see all related images if they were posted with a public profile.
3. Pick a screen name that is appropriate.
4. What you think is humorous might be offensive to others.
5. Never post anything when you're tired, angry, or had a few drinks.
6. Compose your posts in a word document or note app, then paste into your social media format. This gives you time to review your content and check for spelling or grammatical errors before being published.
7. Over-posting. Facebook posts are typically made with less frequency (1-3 per week) than Instagram and Twitter posts, where it's more common for a user to make several posts in one day.
8. Ask permission before posting images of other people and ask a parent before posting a photo of their child.
9. Understand the format, whether it be twitter, Instagram, Facebook or LinkedIn. Read up on their specifics. Remember nothing is free. Your data is being used by others.
10. Use LinkedIn to highlight your accomplishments and do not over embellish your experiences.
11. You could be sharing with thousands of people, so you want to fully understand the platform privacy options and adjust your settings accordingly.
12. Strangers may use your social media profile to try to obtain personal information from you in order to execute a scam or hack. Be aware before you post your email, phone number, or address online for others to use.



*WE WILL STRIVE TO BE A  
FRATERNITY THAT  
FULFILLS OUR MASONIC  
OBLIGATION TO CARE FOR  
OUR MEMBERS*