



# The District Grand Secretary's Handbook





# District Grand Secretary's Handbook



## Foreword

Some say that the Role of Secretary is the most difficult role in a Lodge or District because not only do you have to accomplish a great deal in a very short space of time, but you also have to be aware of the acceptable mechanisms for getting there, navigating the choppy waters of regulations, traditions, and dare we say personalities too.

This manual helps you with the regulations and traditions, detailing common problems and solutions and will be updated annually. It represents a 'best practice' guide to some of the day to day issues a new District Grand Secretary will encounter, and covers some of the common pitfalls and traps to avoid when dealing with the good governance of your District. It draws on the experience and inspiration of hundreds of your predecessors across the country and across the decades and represents the distilled wisdom of the ages.

Suggestions for additions to future additions are always welcome as we strive to make this an essential guide and Manual to the expectations of UGLE and the good running and governance of your Districts.

I wish you luck.

Dr David Staples FRCP

*Grand Secretary and Grand Scribe E*





# District Grand Secretary's Handbook

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## What is ADelphi?

ADelphi is a web-based membership system for all English Freemasonry. Following its re-launch in August 2015, ADelphi enables United Grand Lodge, the Provinces and the Districts to effectively manage their memberships.

### Uses of ADelphi

The system supports a wide variety of processes which include, but are not limited to:

- Member Registration
- Member Management
- Installation Returns
- Annual Returns
- Year Book
- Honours and Appointments
- Grand Ranks

### ADelphi Development

ADelphi is developed in-house by UGLE with development approved and scheduled by the Continuous Development Group (CDG). Requests for development are assessed based on criteria such as the impact of a new feature and how many Provinces/Districts would benefit from it. Deployment of updates takes place every Thursday at 5pm so the system will likely be unavailable at this time.

### Provincial Primary Contact (PPC) / District Primary Contact (DPC)

- PPC - a person chosen by a Province to be the Primary Contact for issues and queries relating to ADelphi.
- DPC - a person here at UGLE who supports the Districts and assists with issues and queries relating to ADelphi.

They will receive email communications regarding deployments and training schedules, as well as other important information. It is expected that they would then distribute the information down to their Province/District. PPC/DPCs also have the ability to reset passwords of ADelphi accounts and are the best placed to raise development requests to be added to the 'Bug & Feature Manager' for the CDG to review.



## New Accounts

To grant access to ADelphi to one of your team you must simply complete a short form providing basic contact information as well as advising on the required level of access. Please liaise with your PPC/DPC for the latest Account Request Form.

## Adelphi Training

Training for ADelphi is provided in a variety of ways:

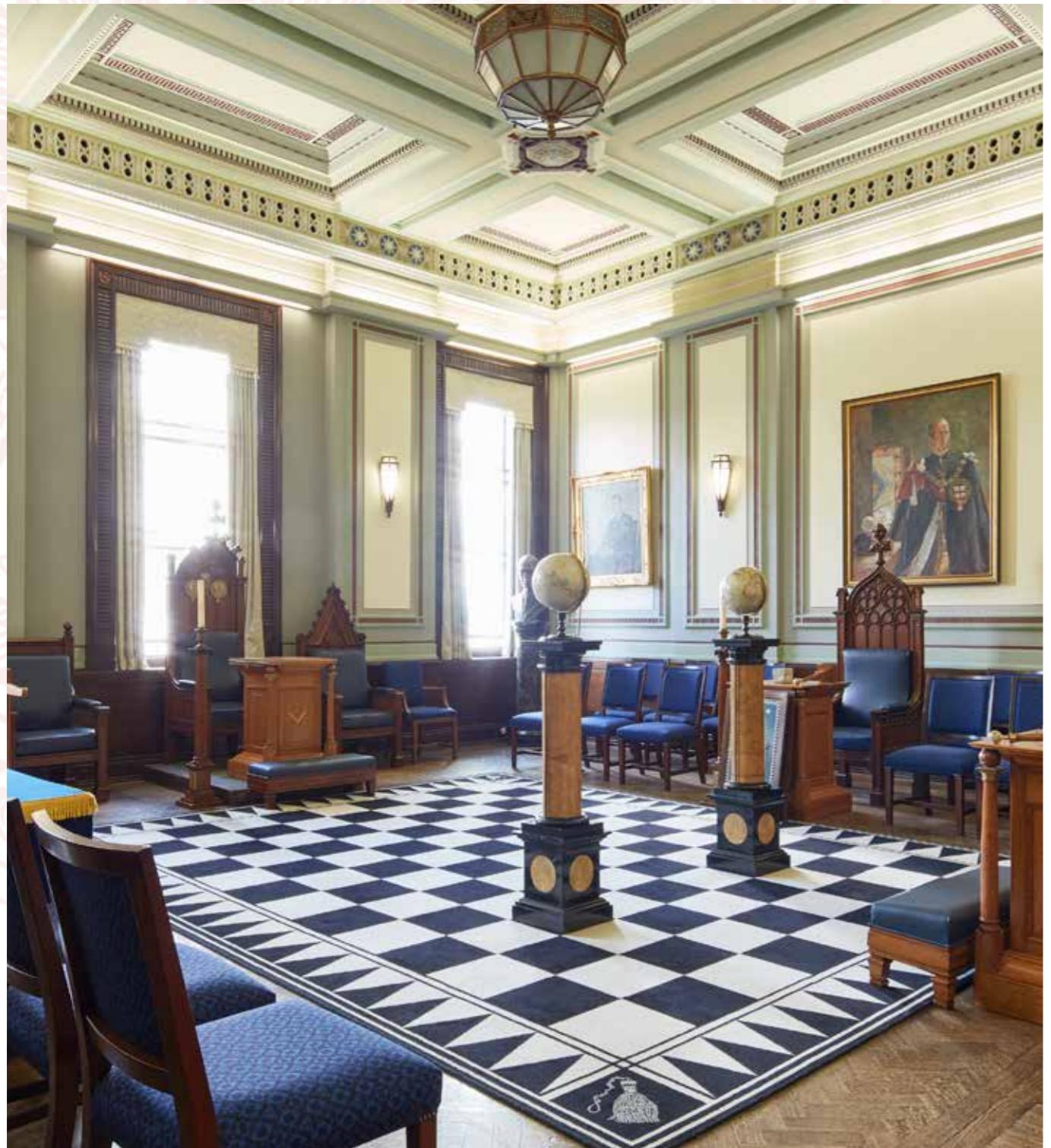
- Live In-House Courses – These courses are run at Freemasons' Hall and usually last from 10:30 until 16:30.
- Webinars – Webinars are hosted online and can be easily joined using your own computer. They usually last between 1 to 2 hours.
- Video Guides – We are in the process of producing a number of video guides to support ADelphi users. These will provide more bite sized content to help with specific tasks.
- Written Guides – We have written guides and user guides available for various areas of the ADelphi system.
- Help File – All ADelphi users have access to the 'Help File' within ADelphi ('Help' -> 'Guides' -> 'ADelphi2 Help'). This will provide step-by-step guides on almost everything within ADelphi.

Ad hoc training can also be set up either over the phone or in person. Please contact ADelphi General Support in the first instance should you be interested.

## Adelphi Contacts & Support

- Account Support (Sign-In Issues & New Accounts)
  - E: [adelphiaccounts@ugle.org.uk](mailto:adelphiaccounts@ugle.org.uk)
  - T: +44 207 395 9373
- General Support
  - E: [adelphi@ugle.org.uk](mailto:adelphi@ugle.org.uk)
  - T: +44 207 395 9373
- Training Support
  - E: [ad2training@ugle.org.uk](mailto:ad2training@ugle.org.uk)
  - T: +44 207 395 9371





### Procedure for obtaining a Certificate of Amalgamation

The grant of a Certificate of Amalgamation will be recommended to the MW The Grand Master by his advisers, who will first wish to be satisfied that the amalgamation is acceptable to the Lodges concerned, that it is viable and it has the support of the Masonic authority or authorities having jurisdiction over the Lodges concerned. The following steps should accordingly be taken in each case:

Once the Brethren of the Lodges involved are satisfied that a reasonable prospect of a successful merger exists, the Metropolitan, Provincial or District Grand Master should set up an advisory Committee\* under the chairmanship of a Brother of the status of a Metropolitan Grand Inspector or Assistant Provincial/District Grand Master to investigate and oversee the arrangements. The Committee should interview representatives (at least three) of each of the Lodges to explain the procedure, examine the proposals and establish a timetable.

The Committee should hold at least one further meeting, not less than four weeks after the first, to enable any representations from the Lodges and the Brethren concerned to be considered.

If the Committee and the Metropolitan, Provincial or District Grand Master remain satisfied that the amalgamation should proceed, the respective Lodges will give the appropriate notices of motion and thereafter pass the resolutions required to effect the merger. When it has been done, the Committee will advise the Metropolitan, Provincial or District Grand Master so that he may formally recommend a petition to the Grand Master through his advisers. As the viability of the proposed merger will be the principal determining factor, the voting figures on the resolutions passed by the Lodges concerned should be submitted with the Petition.

If the Grand Master's advisers recommend the grant of a Certificate of Amalgamation by the Grand Master, it will be conditional upon the acceptance by the continuing Lodge of as many members of the surrendering Lodge as wish to become joining members and the subsequent erasure of the surrendering Lodge. The Certificate will therefore, when issued bear the date of the Quarterly Communication of Grand Lodge at which the resolution for erasure is passed. If there is to be any change to the name of the continuing Lodge to reflect the amalgamation it can conveniently (but need not) be considered at the same time, and would be recommended subject to the same conditions (which will enable the certificate of Amalgamation to incorporate the new name).

Draft Forms of the Lodge Resolutions (which are a guide and may need to be varied for individual cases) are shown on the following page.

*\*In an appropriate case the Committee may consist of single member.*



## Annex 1

### Draft Form of Resolutions to be passed by the Lodge which will continue in existence.

Notice of motion should be given at one regular meeting (in writing on the summons) of the following resolutions:

- a) That this Lodge accept the amalgamation into it of the [.....] Lodge and, jointly with the said Lodge, petition the MW The Grand Master for a certificate of Amalgamation [and for the name of this Lodge to be changed to .....].
- b) That the transfer to this Lodge of such of the assets and funds of the [.....] Lodge as are capable of being disposed by the members thereof shall be deemed to be payment of the joining fees in respect of such members of the [.....] Lodge as wish to transfer their membership to this Lodge.

At the following meeting the Resolutions must be voted on (requiring a two-thirds majority), and this should precede the vote to accept the transfer of membership of members of the other Lodge (also requiring a two-thirds majority), which may take place at this or a subsequent regular meeting held not later than the date of the removal of the Amalgamating Lodge from the register of the Grand Lodge.



## Annex 2

### Draft Form of Resolutions to be passed by the Lodge which will deliver up its Warrant to the Grand Master.

Notice of Motion should be given at one regular meeting (in writing on the summons) of the following resolutions:

- a) That this Lodge, jointly with the [.....] Lodge, petition the MW The Grand Master for a Certificate of Amalgamation with a view to this Lodge being amalgamated into the [.....] Lodge [and for the name of the Lodge to be changed to .....].
- b) That, subject to the grant by the MW The Grand Master of a certificate of Amalgamation and to the acceptance by the [.....] Lodge of as many members of this Lodge as wish to transfer their membership to it, the assets and funds of and disposable by this Lodge [with the exception of .....] be transferred to the [.....] Lodge and this Lodge submit its Warrant for formal cancellation so that it may be delivered to and be held by the Master for the time being of the said [.....] Lodge.

**Note:** individual Lodges may be subject to restrictions on the disposal of the general or charity funds and such issues will need to be addressed at an early stage and embodied in the resolutions.

At the following meeting the Resolutions must be voted on, requiring a simple majority AND not less than five members voting in favour.

January 2021  
Masonic Services



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## Badges and Designs

### Lodge Badges

The following notes are intended to help Lodges in preparing designs for their badges before submitting them to the Grand Secretary via the Provincial the ME The First Grand Principal.

The principles explained in the notes apply equally to designs – which also require approval – for Founders' Jewels, Past Masters' Jewels and Banners, etc. (see 'Approval of Designs' in *Information for the Guidance of Members of the Craft*).

It is not possible to foresee every problem that might arise, and it should therefore be noted that adherence to every point in the notes does not guarantee that the design will be approved.

The notes do contain a depressing number of negatives, but design is possible if the guidelines are read and understood prior to submission. (Too much unnecessary time is taken both at local level and in the Grand Secretary's office in returning designs for small amendments which, if the guidelines had been observed, would have been acceptable for approval.) If extreme difficulty is encountered, the Grand Secretary's office (Masonic Services Department) will almost certainly be able to help further.

### Designs – the most common pitfalls

On the initial submission of a design, please include an explanation of any symbolism and how each aspect is of significance to the Lodge.

Any Latin motto should have its meaning checked by someone who understands Latin as often a translation by someone who is not an expert can have the wrong meaning. The Google translator is not always accurate and a more thorough check should be made. It may be easier to use simple English and avoid Latin altogether.

Avoid dark blue, which is the colour appropriate to Grand Rank, as a background colour. Unless specific reasons can be given for the use of this colour, it is likely to be returned for amendment and unlikely to be approved.

The Square, often shown as part of the Square and Compasses, on any application must, without exception, be at exactly 90 degrees. The dangers of cut and paste, or stretching a design to fit on a computer-assisted design, often distorts the angle.

The name of the District in which the Lodge meets may be included, but the wording should be smaller and less obvious than the Lodge name and number to avoid the design being perceived as a 'District design'. The District Arms should not be used for private Lodges.

The Lodge name and number must always be included prominently; to standardise designs the name should be shown in full and the number must always be preceded with 'No.' (i.e. the lettering capital 'N', small 'o' and a full stop. {No.})



A letter 'G' within the Square and Compasses (which is, among others, an American and Scottish practice) must be avoided.

A little care in avoiding the above and following pitfalls will result in less time having designs returned for amendment.

## Armorial Bearings and Badges

Lodges are recommended to adopt Badges in preference to Arms. Arms are heraldic devices borne on a shield. A Badge consists of some object or objects combined to form a design without the use of a shield.

The grant of Arms, which carries the right to bear them, is a Royal Prerogative. Lodges, which wish to design and assume Arms, must consult the College of Arms. The Grand Secretary's office (Masonic Services Department) will be able to furnish you with the contact details of the Officer at the College of Arms who is best positioned to provide guidance on Masonic heraldry.

No part of the Royal Coat of Arms may be assumed by a Lodge without express consent of the Sovereign, or other Royal Person whose Arms are concerned.

No private Lodge is permitted to use the Arms of the United Grand Lodge of England.

No Arms of an individual or Corporation may be adopted without the written consent of such individual or Corporation, and in the case of consent being given the Arms must be used in their entirety. N.B. Even when such consent is obtained, it may not be appropriate for the Lodge to use Arms, which have been designed to represent an individual or public body, and therefore approval may be withheld.

No Lodge may adopt as Arms a portion of an existing Coat of Arms, even if permission be given by the holder, since such adoption would amount to the assumption of a new Coat of Arms (see 14 above).

Designs may not be approved if they are heraldic in character or attempt to avoid the Laws of Arms by using a corruption of a shield outline.

Arms that have become extinct cannot be used unless written consent was given prior to their becoming extinct.

A small shield carried by a knight as part of the design of a badge is permitted, since this is only coincidental to his accoutrements; in most cases the shield is seen in perspective, and thus cannot be regarded as Arms in the ordinary sense.

## General

Check the Lodge records to see if there are any previous approvals or permissions, which should accompany a design submission. A large number of previous approvals are on file at Grand Lodge and it may be prudent to check if there are any previous permissions which could assist approval of a new design.

Many Lodges in the distant past have had banners made or included designs on Summons and paperwork without seeking prior approval. A banner may therefore be extremely old but its renewal may not be approved because no permission for the previous design existed and the design may not be approvable.

Designs for Lodge Badges are sometimes submitted with the Petition for a new Lodge, but they cannot be approved until a Warrant has been granted. However, if the matter is urgent, the design may sometimes be provisionally approved subject to the grant of a Warrant.

Symbols foreign to the Craft, for example interlaced triangles (which are Royal Arch) should not occur. Most Craft badges have a (or the) Square and Compasses incorporated, but these are not essential.

## Religious Symbols

Symbols associated with one particular religion or religious denomination for example, the Cross must not be included as a predominant part of the design. If the Lodge is named after a Saint who is depicted in the badge, then a small cross may be carried by the Saint.

## Imperial Crown

The Imperial Crown is the one shown on Government documents and all publications (e.g. British Passports, United Kingdom Driving Licences and top right corner on obverse of £5 Sterling bank notes). These vary slightly but are intended to be the same Crown, and will not be approved as part of a badge. A Saxon crown or a nondescript one (such as is shown in Plate 31 of the Royal Arch Regulations) may be allowed.

## Corn and Acacia

A wreath composed of corn and acacia (as shown in the jewels of Grand Officers) is not allowed, since these emblems are symbolic of Grand Rank. Laurel Leaves are a good substitute to avoid refusal.

### Notes Lodge Badges

Ref. *Book of Constitutions*, Rules 241, 229

*Information for the guidance of members of the Craft*, P.5 (2017) Approval of Designs

January 2021

Masonic Services





The following points may help if a Lodge in your District intends to apply for a Bi-Centenary Warrant.

### Applying for a Bi-Centenary Warrant

Before beginning to make any arrangements for the Bi-Centenary celebrations, you should write to Masonic Services (currently Luke Morris) to enquire whether Grand Lodge records provide proof of the uninterrupted existence of the Lodge for 200 years (as required by Rule 252), or whether some additional evidence is required: e.g. it may be necessary for the Lodge to submit its early Minute Books for inspection.

This can be done some 2 or 3 years in advance, and, if all is in order, the exact date from which the Bi-Centenary Warrant should take effect will be communicated to you, along with the appropriate time formally to petition the MW The Grand Master (about 12 months before the effective date of the Bi-Centenary).

### The Bi-Centenary Meeting

It must be decided whether the celebration is to form part of a Regular Meeting or whether an Emergency Meeting is to be called. If the latter, what follows is suggested for the agenda:

- a) To open the Lodge;
- b) To read the Dispensation;
- c) To receive the RW District Grand Master;
- d) To receive distinguished visitors (or, e.g. MW Bro..... Pro Grand Master and other Grand Officers);
- e) To attend to a short history of the Lodge (or extracts from the Minutes of the Consecration Meeting);
- f) To receive the Bi-Centenary Warrant (this item includes the reading of the Warrant, which is generally done by the Grand Secretary or his representative);
- g) To attend to an oration (by a Grand Chaplain or Deputy or Assistant or the District counterpart);
- h) To close the Lodge (no Risings in an Emergency Meeting).

(As an alternative to item e. the Lodge Warrant is sometimes read).

If a Regular Meeting, the normal business is transacted first, and followed by items c. to f. It would be inappropriate for 'normal business' to include an Initiation.



The Rulers are less reluctant than they used to be to wear full dress regalia away from Grand Lodge, and it would be helpful to have an indication of whether your District Grand Master would prefer to wear full or undress regalia. It may also help you to know that the Rulers (and Grand Officers travelling with them) prefer morning dress to evening for this sort of occasion.

At dinner the speeches should be confined to the occasion, and should consequently be few in number. You may assume that the Grand Officer who presents the Warrant will reply to the toast of the Grand Officers and go on to propose the health of the District Grand Master. The toast of District Grand Officers is usually omitted, and the District Grand Master's reply to his toast can then easily go on to propose the toast of the Lodge.

## Planning

The Bi-Centenary Meeting may be held on or after the effective date of the Bi-Centenary. The Guest of Honour is normally the MW Pro Grand Master or the RW Deputy or Assistant Grand Master.

Would you please let Masonic Services have three or four dates which are convenient for the District and the Lodge and on which the necessary accommodation is available? It is useless to try to do this too far in advance (about nine months beforehand is best) and Fridays and Saturdays should be avoided as the Rulers are unlikely to be available. Any dates submitted will be considered by the Pro Grand Master or the Deputy/Assistant Grand Master to see which of them will be available.

The Guest of Honour will be accompanied by the Grand Director of Ceremonies or a Deputy Grand Director of Ceremonies and either the Grand Secretary or his representative.

It has become an established custom that the District pays for any hotel accommodation required for the 'London Party': Grand Lodge pays for their travel costs.

It is usual to call upon a Past (or Past Deputy or Assistant) Grand Chaplain or a District counterpart to deliver the Oration. If you will let me know which Brethren of these ranks are likely to be present, Masonic Services will arrange this.

Would you please let Masonic Services have a look at drafts of:

- the agenda
- the toast list
- a list of proposed wine takings (if customary in the Lodge)
- a seating plan for the top table at dinner

before they are finalised, and also let Masonic Services have, at least ten days before the meeting, some biographical notes on the Master, Secretary and the three senior members of the Lodge as well as the senior Brethren of the District who will be attending.

At the same time, copies of the Lodge History (or of the draft if a History is being prepared) or some notes on the Lodge should be sent to Masonic Services and to the Chaplain who is to give the Oration. The Librarian at Freemasons' Hall would also be grateful for a copy (after the meeting if necessary) for Grand Lodge's records.

Occasionally it has been found that wand stands are designed to hold wands of a lesser diameter than Grand Lodge's travelling wands. The diameter of the base of our wands is 1"; would you please ensure that wand stands are available which will hold our wands.

## The Bi-Centenary Warrant

The Bi-Centenary Warrant is an illuminated document on vellum. It records that the Lodge has completed 200 years of uninterrupted existence, and authorises the wearing of a Bi-Centenary Bar on the ribbon of the Centenary Jewel. It in no way supersedes the Warrant of Constitution which remains the sole authority under which the Lodge works. The formal notice sent when a Bi-Centenary Warrant has been granted will tell you the fee then payable to the Fund of General Purposes under Rule 270.

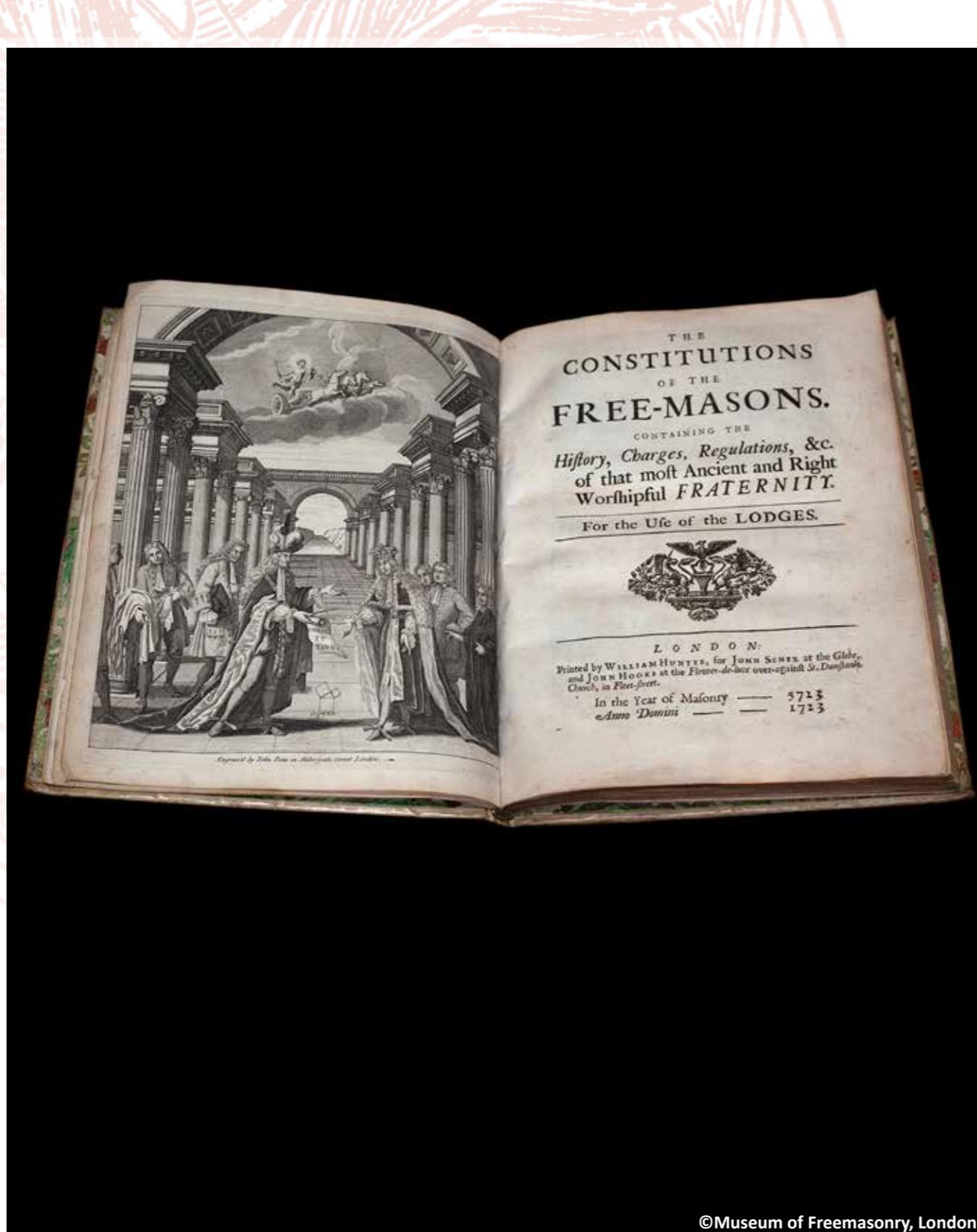
## The Bi-Centenary Bar

The Centenary Jewel with the Bi-Centenary Bar is illustrated in colour in the Bi-Centenary Warrant and in outline form in Plate 59 of the Appendix to the Book of Constitutions. It may be worn not only by those Master Masons who are subscribing members when the Bi-Centenary is reached, but also by those who subsequently become members of the Lodge. The Jewel must be obtained direct from a Masonic Jeweller.

Masonic Services

January 2021





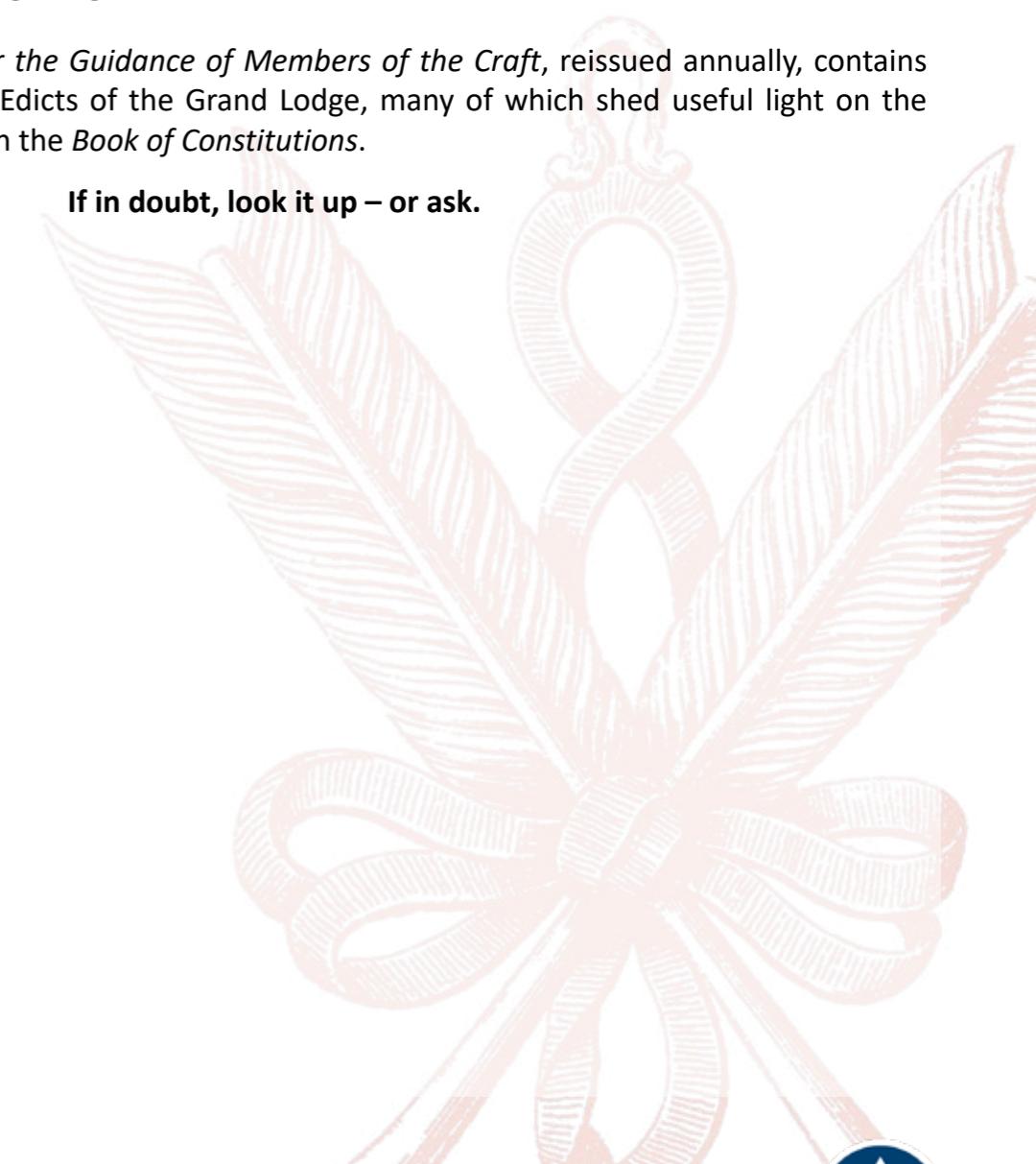
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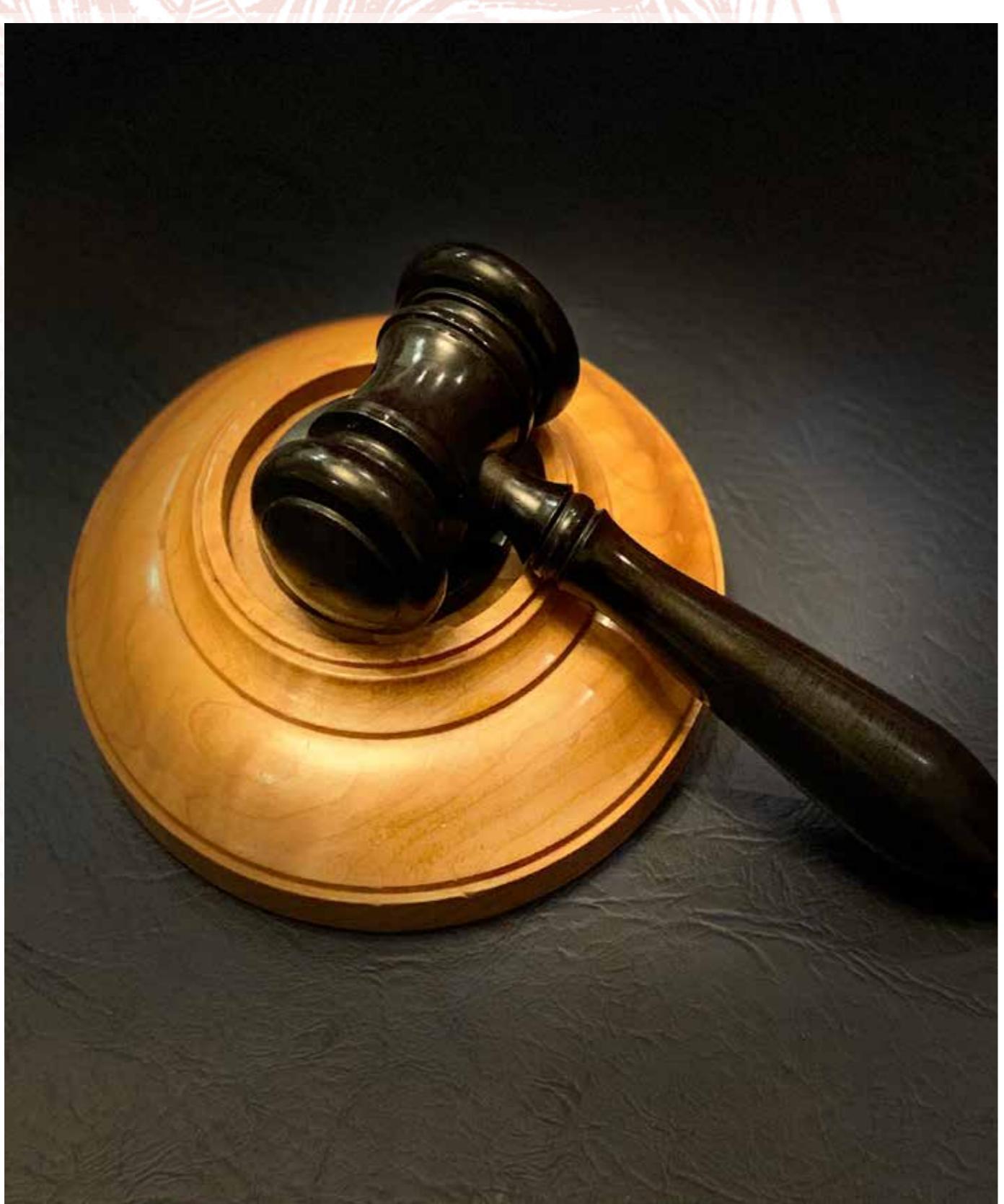
The Book of Constitutions contains the Rules under which English Freemasonry operates. The Rules are binding on everyone from the Grand Master down to the most junior Entered Apprentice. A Provincial or District Grand Secretary should have a working knowledge of the Book and the Rules it contains, and should know in outline whereabouts in it to find the Rules relevant to any common situation. It can be dangerous to rely on your memory – or on what other people have told you – as to what the Book provides: in any case of doubt the Book should be consulted and where necessary guidance on its interpretation sought.

It is also available online at [ugle.org.uk/about-us/book-of-constitutions](http://ugle.org.uk/about-us/book-of-constitutions)

The booklet *Information for the Guidance of Members of the Craft*, reissued annually, contains the most important of the Edicts of the Grand Lodge, many of which shed useful light on the interpretation of the Rules in the *Book of Constitutions*.

**If in doubt, look it up – or ask.**





### Policy on Amendment

1. Traditionally the Grand Secretary's Office has, for sound administrative reasons, dealt with amendments to by-laws (both at Private Lodge and District level) on the basis that it is only the amendment which is under scrutiny and that other by-laws unaffected by the amendment, even if they would not under current practice be approved, need not be re-opened and scrutinised in the same way. By contrast, when a new set of by-laws has been adopted, the entire set has been scrutinised and the amendment of any provision carried over from the previous set has been insisted on if it would no longer receive approval.
2. Existing Districts already have by-laws – of varying age and complexity. New Districts are extremely rare. Accordingly, unlike Private units, there is no “model set” available, nor is it suggested that there should be. Similarly, it is only rarely that a “root and branch” revision of District by-laws proves necessary, or even desirable.
3. Of recent years it has become increasingly common for Provinces (and, to a lesser extent, Districts) to amend their by-laws by approving/adopting a “new” set. As has already been noted, however, only rarely is this truly the case; in most instances the differences from the previous set of by-laws are few – in some cases only an increase in the amount of fees or annual dues. Not only is this approach to amendment misconceived, it is also profoundly unhelpful both to the Grand Secretary's staff, on whom devolves the duty of checking the “new” set, and to the Brethren/Companions of the Province or District, from whom, for no good reason, the nature of the actual amendment is concealed unnecessarily.
4. Hitherto the Grand Secretary's Office has looked to the reality rather than the form involved in the amendment/adoption of by-laws, and has therefore, when a “new” set has been adopted, not reopened the whole set unless the amendments are substantial. The process of comparing the “new” with the old is time-consuming and has often had to be postponed in favour of more immediately pressing tasks. This has led to delays in the approval of sets of by-laws that have already been passed by the District Grand Lodge, and in advising on proposed sets before they are submitted to the District Grand Lodge.
5. To speed up the process of approval, the Grand Secretary's Office will in future treat any “new” sets of by-laws submitted for approval as being exactly what they are described as, and reopen every provision contained in them. This will inevitably delay approval. Simple amendments will, however, be dealt with as expeditiously as possible, and it is hoped that this will minimise the time before approval is received.
6. The recommended form of a resolution for amendment of by-laws is “That by-law x be amended to read .....” (or “That by-law x be amended by substituting for the words ..... the words .....”). To this can be added a note, if desired, along the lines of “The by-laws as they would be if the amendment is passed [are set out in the schedule to this agenda]/[have been sent to the Secretary of every Lodge/Chapter in the Province/District].”

By-Laws of the \_\_\_\_\_ Lodge  
No. \_\_\_\_\_

## See 1. Place and Dates of Meeting

Note 1 The Lodge shall meet at the \_\_\_\_\_ and shall hold regular meetings on the \_\_\_\_\_ at such hour as the Master shall direct.

## See 2. Election and Installation Meetings

Note 2 The Master and the Treasurer shall be elected by ballot at the regular meeting in \_\_\_\_\_. The Master Elect shall be installed at the regular meeting in \_\_\_\_\_.

## See 3. Election of Tyler

Note 3 Subject to the provisions of Rule 113, Book of Constitutions, the Tyler shall be elected by show of hands at the regular meeting in \_\_\_\_\_.

## See 4. Lodge Committee

Note 4 The Lodge Committee shall consist of the Master, Wardens, Past Masters of [and in] the Lodge, Treasurer, Secretary and \_\_\_\_ other members to be elected annually by the Lodge at the regular meeting in \_\_\_\_\_. This Committee shall consider and report to the Lodge on all proposals for membership and on any matters specially referred to it by the Lodge. \_\_\_\_\_ members of the Committee shall form a quorum.

## See 5. Audit Committee and Annual Accounts

Note 5 The Audit Committee shall consist of \_\_\_\_ members of the Lodge who shall be elected annually by the Lodge at the regular meeting in \_\_\_\_\_.

Note 6 The accounts shall be made up to \_\_\_\_\_ in each year and shall be presented to the Lodge, duly audited, at the regular meeting in \_\_\_\_\_. A copy of the accounts and of the Audit Committee's certificate that all balances have been checked and that the accounts have been audited shall be sent to all members with the summons convening the meeting.

## See 6. Fees and Annual Subscription

Note 7 The Initiation fee shall be £ \_\_\_\_ the joining fee £ \_\_\_\_ and the re-joining fee £ \_\_\_\_ Such fees to be exclusive of subscription.

Note 8 [In addition to these fees the candidate shall pay to the Lodge such registration fees as are payable to Grand Lodge and, if applicable, \*Metropolitan/\*Provincial/\*District Grand Lodge together with any tax thereon and the candidate shall before becoming a member be informed of the total amount due.] \*Delete as appropriate.

Note 9 See The annual subscription (except for non-dining or country membership as provided for in By-Law No. 7) due and payable in advance on 1st \_\_\_\_\_ shall be of such amount as the Lodge shall from time to time decide by resolution after notice on the summons at the previous regular meeting.

Note 10 See [The Secretary's services shall be deemed equivalent to payment of subscription.] [The visitor's fee at dinners shall be such amount as the Lodge shall from time to time determine by resolution after notice on the summons.] [The Master shall have the privilege of inviting \_\_\_\_ guest(s) to each dinner free of the visitor's fee.] \*Delete as appropriate.

Note 11 See [Any member whose subscription is unpaid for \_\_\_\_ months shall be liable to be excluded from the Lodge, after due notice, in accordance with Rule 181, Book of Constitutions.]

## See 7. Non-dining or Country Membership

Note 9 Any member who, for reasons acceptable to the Lodge, is not in a position to enjoy the privileges of the Lodge regularly may on written application to the Secretary and by resolution of the Lodge be considered a non-dining or country member and shall pay a subscription annually in advance on 1st \_\_\_\_\_ of such less amount than that provided for in By-Law No. 6 as the Lodge shall from time to time decide by resolution after notice on the summons at the previous regular meeting. When attending the Lodge and dining such member shall pay the current visitor's fee.

## See 8. Admission of Candidates

Note 13 The admission of candidates for initiation and joining shall be regulated by the provisions of Rules 157 to 166, Book of Constitutions. On the ballot for a candidate for initiation or joining \_\_\_\_ black ball(s) shall exclude.

## See 9. Termination of Membership

Note 12 Any member desirous of terminating his membership of the Lodge shall tender his resignation in writing to the Secretary, or orally in open Lodge, in accordance with Rule 183, Book of Constitutions, and he shall be entitled to the Certificate mentioned in Rule 175, Book of Constitutions, stating the circumstances in which he left the Lodge. Should he at any future time wish to rejoin he shall be subject to the rules relating to joining members.

## See 10. Payments from Lodge Funds

Note 14 Payment of any sum exceeding £ \_\_\_\_ if for other than ordinary purposes may be made only by resolution of the Lodge, of which notice has been given on the summons, except in a case of emergency when such payment may be authorised by the Master and reported to the Lodge at the next regular meeting.

## See 11. Amendment of By-Laws

Note 15 Except as otherwise required by Rule 141, Book of Constitutions, amendment of these By-Laws or of any of them may be made only in the following manner:-

(a) Notice of Motion in writing stating the precise amendment or amendments proposed shall be given in open Lodge at a regular meeting.

(b) The Motion shall be set out on the summons for the next regular meeting or for an Emergency meeting summoned for the purpose and shall at such meeting be put to the Lodge.

(c) A resolution for amendment, of which notice shall have been given as aforesaid, shall be carried if a majority of the members voting shall vote in favour of it but it shall not be effective until approved [by the \*Metropolitan / \*Provincial / \*District Grand Master / \*Grand Inspector and] by the Grand Master.

\*Delete as appropriate.

Should there be any objection to the introduction of a Candidate for Initiation, or a Brother for Joining, it is recommended that such objection be mentioned privately to the Master or Secretary who may communicate with the proposer and give him the opportunity of withdrawing his Candidate.

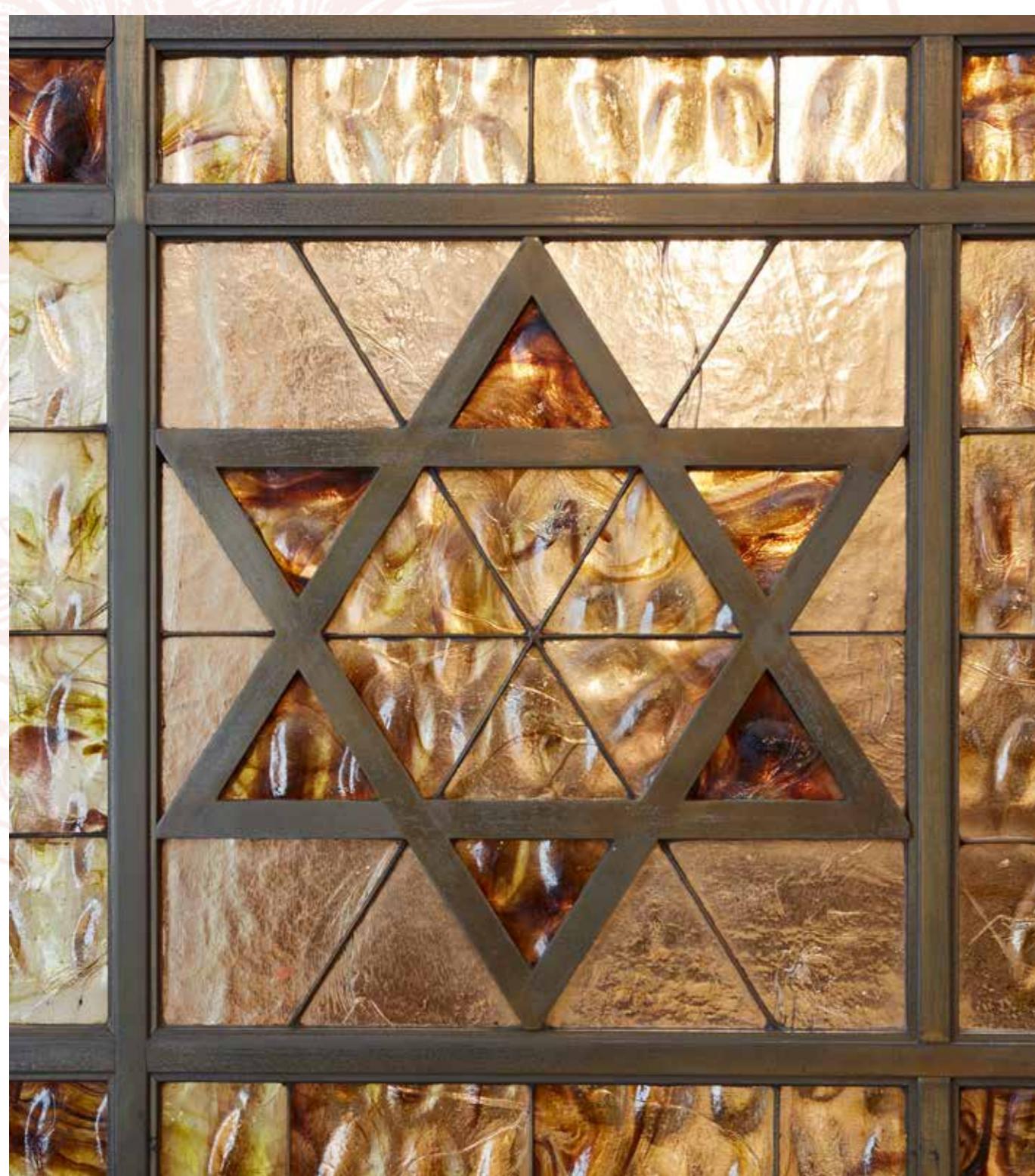
**N.B.** - The numbers of the Rules in the Book of Constitutions above are those in the 2014 re-print.

## Notes

A set of By-laws following the wording overleaf (varied in accordance with the notes below, if applicable) will conform to the Model for the purposes of Rule 136, Book of Constitutions, so that the Metropolitan, Provincial or District Grand Master or Grand Inspector will be authorised to approve such By-laws on behalf of the Grand Master. In all other cases the By-laws must be submitted for the approval of the Grand Master. No By-law can override an express provision of the Book of Constitutions.

1. A Lodge may have only a single meeting place specified in its Warrant and its By-laws.
2. The Election meeting must be the regular meeting immediately preceding the Installation meeting.
3. A Lodge may, by annual resolution, resolve that a subscribing member shall be Tyler without emolument, but this must not be embodied as a requirement in its By-laws.
4. Forming a Committee is a domestic matter and, while the principal officers are obviously necessary (and other Officers than those named below are permissible), the words 'Past Masters of' or 'Past Masters of and in' the Lodge may be omitted or their number restricted, e.g. two 'of' and one 'in'. Other members should only be included if the Lodge considers them essential. The most effective Committee is often small. The same applies to the quorum and it is advantageous if it is an odd number.
5. It is strongly recommended that the Audit Committee be small, say two or three members.
6. The audited accounts must be presented no later than the third meeting after the date to which the accounts are made up.
7. A fee, unlike a subscription, is a single 'one-off' payment and, again unlike a subscription, must be of an amount specified in the By-laws. Though a relatively nominal amount for a joining or re-joining fee may be appropriate, a nil amount will not be approved.
8. It is strongly recommended that the words contained within the square brackets, though optional, be incorporated into the By-laws, as that will obviate the need for regular increases in fees. See Rule 163 (j), Book of Constitutions. If used, the words must be included in their entirety.
9. The subscription due date must be the first day of a calendar month. If the subscription is exclusive of dining fees the reference to non-dining should be deleted from By-laws 6 and 7. The paragraph should then read:- 'The annual subscription due and payable in advance on 1st \_\_\_\_\_ and exclusive of dining fees, shall be of such amount as the Lodge shall from time to time decide by resolution after notice on the summons at the previous regular meeting. The fees for members and visitors at dinners shall be such amounts as the Lodge shall from time to time decide by resolution after notice on the summons at the previous regular meeting.' As an alternative to the last sentence above, and if appropriate, the wording may be amended to:- 'The fees for members and visitors for dining shall be 'at cost'. The members can be informed of the dining fee by a separate note included with the summons for each meeting.
10. While Rule 104(c), Book of Constitutions, allows for the Secretary's services to be equivalent to payment of subscription, this is an option for the Lodge to adopt, as is the provision for the Master's privilege to invite guests at the Lodge's expense.
11. The minimum time period for excluding a member from the Lodge for non-payment of subscription that will receive approval is three months. See Rules 145 and 181, Book of Constitutions. There will be no advantage to the Lodge if the period stated is one calendar year or more.
12. If By-law 6 is amended as shown in Note 9 above the last sentence of By-law 7 should refer to the 'current dining fee'.
13. Not more than three. See Rule 165, Book of Constitutions.
14. It is suggested that the amount be high enough to be realistic, but not so high as to allow undue latitude. A recommended figure would be in the range of £100 to £200.
15. The words in square brackets must be omitted in the case (but only in the case) of an unattached Lodge.





The following points may help if your Lodge intends to apply for a Centenary Warrant.

## Applying for a Centenary Warrant

1. Before beginning to make any arrangements for the Centenary celebrations, you should ask your District Grand Secretary to enquire whether Grand Lodge records provide proof of the uninterrupted existence of the Lodge for 100 years (as required by Rule 252), or whether some additional evidence is required: e.g. it may be necessary for the Lodge to submit its early Minute Books for inspection.
2. This can be done some two or three years in advance, and, if all is in order, I will let him know the exact date from which the Centenary Warrant should take effect (normally the 100th anniversary of the Consecration), and the appropriate time formally to petition the MW The Grand Master (about 12 months before the effective date of the Centenary).

## The Centenary Meeting

3. It must be decided whether the celebration is to form part of a Regular Meeting or whether an Emergency Meeting is to be called. If the latter, what follows is suggested for the agenda:
  - a) To open the Lodge;
  - b) To read the Dispensation;
  - c) To receive distinguished visitors (or to receive the RW District Grand Master);
  - d) To attend to a short history of the Lodge (or extracts from the Minutes of the Consecration Meeting);
  - e) To receive the Centenary Warrant (this item includes the reading of the Warrant by the District Grand Secretary or his Representative);
  - f) To attend to an Oration (by a District Grand Chaplain or Deputy or Assistant);
  - g) To close the Lodge (no Risings in an Emergency Meeting).

(As an alternative to item d. above, the Warrant of the Lodge is sometimes read, but as much of its message is summarised in the Centenary Warrant it may be preferable to avoid having both documents read.)

If a Regular Meeting, the 'normal business' is transacted first, and followed by items c. to f.

4. At dinner the speeches should be confined to the occasion, and should consequently be few in number. It is usual for whoever presents the Warrant to propose the toast of the Lodge, and it is advantageous if he can lead on to this when replying to a toast with which his name has been coupled.



## Planning

5. The Centenary Meeting may be held on or after the effective date of the Centenary.
6. The Centenary Warrant is usually presented by the District Grand Master or his Representative. You should therefore consult your District Grand Secretary before a definite date is fixed and about the arrangements for the meeting generally.

## The Centenary Warrant

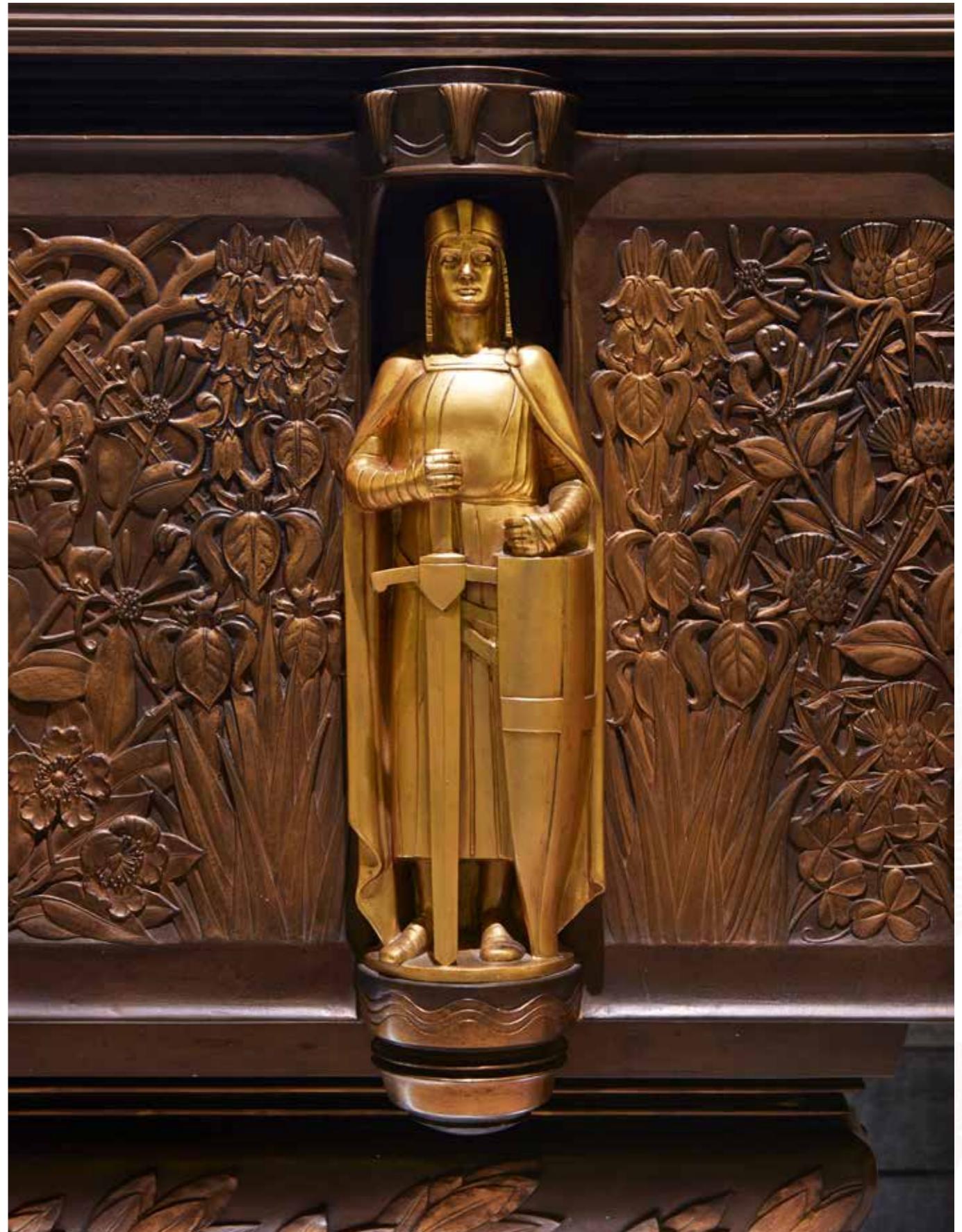
7. The Centenary Warrant is an illuminated document on vellum. It records that the Lodge has completed 100 years of uninterrupted existence, and authorises the wearing of a Centenary Jewel. It in no way supersedes the Warrant of Constitution which remains the sole authority under which the Lodge works. The formal notice sent when a Centenary Warrant has been granted will tell you the fee then payable to the Fund of General Purposes under Rule 270.

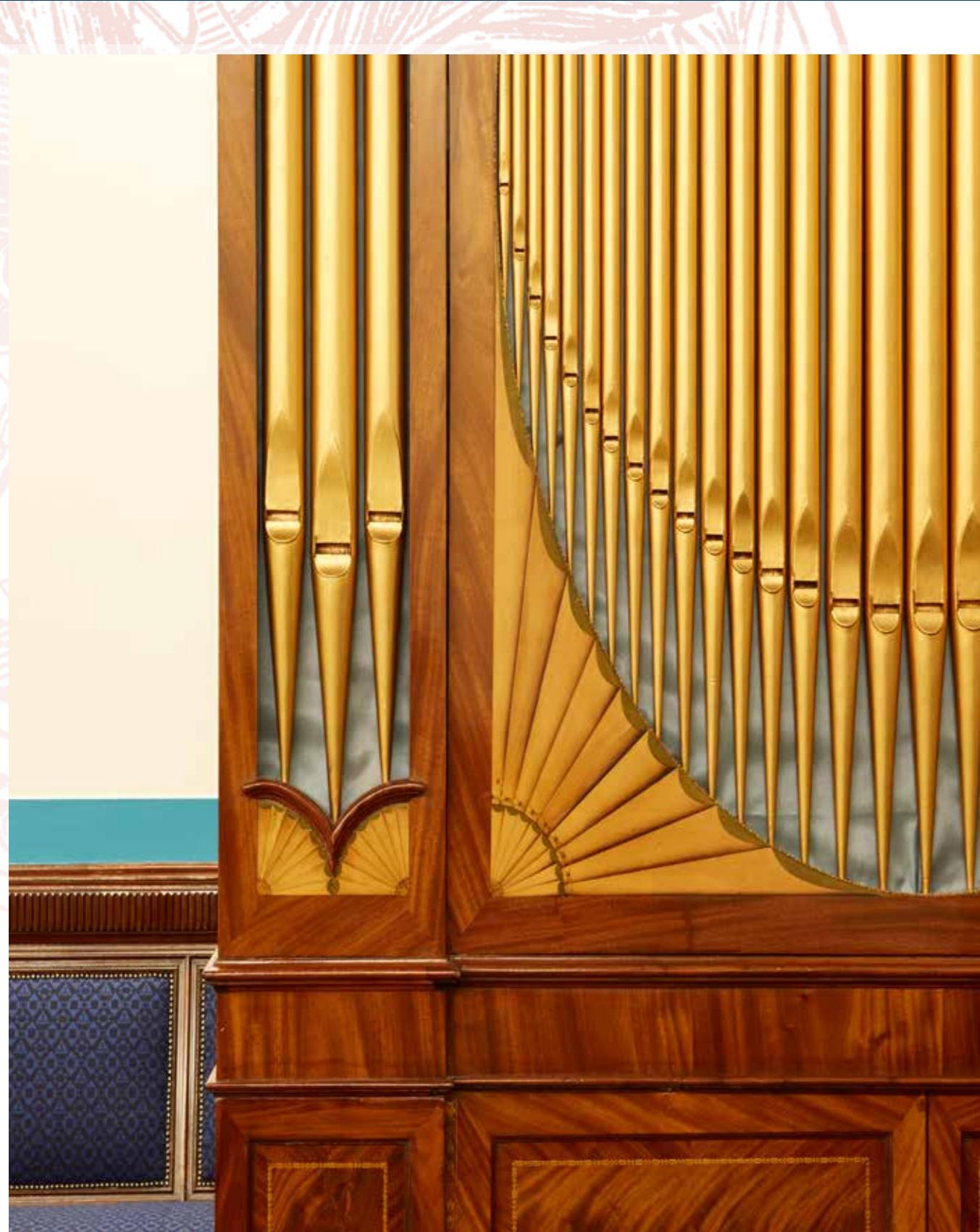
## The Centenary Jewel

8. The Centenary Jewel is illustrated in colour in the Centenary Warrant and in outline form in Plate 59 of the Appendix to the Book of Constitutions. It may be worn not only by those Master Masons who are subscribing members when the Centenary is reached, but also by those who subsequently become subscribing members of the Lodge. The Jewel must be obtained from a Masonic Jeweller.

January 2021

Masonic Services





### What is the main function of the Communications and Marketing Department?

The Communications and Marketing Department manage, monitor and produce both internal and external communications with the goal of improving Freemasonry's public perception.

### How is the team structured?

The team is led by Michelle Worvell, Director of Communications and Marketing and is split in to four distinctive areas.

First, membership communications – dealing with how we communicate with our members and advising on how Districts communicate externally. This area is managed by Communications Manager and FMT Editorial Manager Shaun Butler. Shaun also manage UGLE's social media platforms.

Second, our web presence is managed by Web Content Manager Dean Simmons, who is maximising the capacity of our web presence and making sure that the central messages of our communications are effectively communicated. Alessio Cofone works in Dean's team and is our Digital Marketing Executive, working on SEO and website statistics.

Third, public relations are managed by Livia Ferreira, who communicates UGLE campaigns and initiatives to the press and non-members, with the intention to improve public perception of Freemasonry.

Fourth, internal communications within UGLE. George Clarke is our Internal Communications Executive. George works on communications to UGLE staff, including our Intranet and staff newsletter, The Right Angle.



## Websites

The current websites managed by the UGLE Communications and Marketing Team are:

*United Grand Lodge of England* ([www.ugle.org.uk](http://www.ugle.org.uk))

*Freemasonry Today* ([www.freemasonrytoday.com](http://www.freemasonrytoday.com))

*Supreme Grand Chapter* ([www.supremegrandchapter.org.uk](http://www.supremegrandchapter.org.uk))

*Member's website* (<https://members.ugle.org.uk>)

*Universities Scheme* ([www.universitiesscheme.com](http://www.universitiesscheme.com))

*bUGLE* (<https://b.ugle.org.uk>)

## Social Media

The social media accounts that are currently operated by the Communications and Marketing Team are:

### Facebook

United Grand Lodge of England

Supreme Grand Chapter

Freemasonry Today

Freemasons' Hall

### Twitter

@UGLE\_GrandLodge

@Freemasonry2Day

@freemasonshall

@GrandChapter

### Instagram

@unitedgrandlodgeofengland

@freemasonrytoday

@freemasonshall

### Team accounts

@WorvellMichelle

@Shaun\_UGLE

@Dean\_UGLE

@LiviaUgle

## Freemasonry Today

This is the in-house magazine of the United Grand Lodge of England and we always welcome content for inclusion.

Stories can be submitted for consideration through this link:

[www.freemasonrytoday.com/article-submission](http://www.freemasonrytoday.com/article-submission)

## District Communications Officers

Each District should also have a District Communications Officer (DCO) who leads on communications output within the District. Each DCO also has a unique login to a Contributor section of the Freemasonry Today website which allows them to upload their own stories. We then edit these if necessary and upload them to the Freemasonry Today website and social media.

Shaun Butler is the team's contact point for DCO's and will be able to help with any issues that may arise.

## Department contacts

Michelle Worvell - Director of Communications and Marketing: [mworvell@ugle.org.uk](mailto:mworvell@ugle.org.uk)

Shaun Butler - Deputy Director of Communications and Marketing: [sbutler@ugle.org.uk](mailto:sbutler@ugle.org.uk)

Alessio Cofone – Web Content Manager: [acofone@ugle.org.uk](mailto:acofone@ugle.org.uk)

Livia Ferreira – PR Manager: [lferreira@ugle.org.uk](mailto:lferreira@ugle.org.uk)

George Clarke – Internal Communications Executive: [gclarke@ugle.org.uk](mailto:gclarke@ugle.org.uk)

January 2021

Communications





## Introduction

UGLE uses the data of its members for the purposes set out in its data protection notice. The latest version is published at: [www.ugle.org.uk/data-protection-notice](http://www.ugle.org.uk/data-protection-notice)

The Provinces and European Districts are subject to broadly common data protection laws, with most Provinces subject specifically to English data protection laws. UGLE has issued the guidance and templates listed below to assist Provinces, Districts and Lodges to comply with those laws. Non-European Districts are subject to a range of different legislative frameworks, but might find the documents useful when tailored appropriately.

1. Data Protection FAQs for Lodge Secretaries;
2. Data protection FAQs for Lodge Almoners;
3. Template word document for a Provincial/District data protection notice;
4. Template word document for a Lodge's data protection notice;
5. A data protection policy adopted by the Province of East Kent to guide its officers and volunteers on compliance in this area. The Province has given permission for the policy to be used and adapted by any Province or District whether Craft or Royal Arch, should they wish;
6. Data Protection FAQs on Year Books.

These are all provided to help share knowledge and guidance but are not legal advice and are not a substitute for independent legal advice on compliance, if considered necessary.

The above mentioned documents follow.



## Data Protection FAQs for Lodge Secretaries

This is the second version of these FAQs, which are compiled in response to a number of queries which UGLE has received about what individual Lodges need to do with regard to data protection. It replaces the previous version dated 30 April 2018. The differences between the versions are largely a matter of emphasis and of the changing nature of the queries that UGLE has received as new data protection legislation has bedded in.

### Do I need to collect individual consents from new joiners/initiates?

The standard application forms for initiates or joiners collect the necessary consents from them.

### Do I need members' consent to store their details?

There is no need to obtain consents from existing members for normal Lodge business.

### How should I store members' details?

Members' details should only be used for normal Masonic activities relating to the Lodge such as issuing Summons, arranging Almoner's visits, chasing subscription payments or Lodge committee business or for activities relating to Provinces, Districts or UGLE such as submitting annual returns or contributing to disciplinary processes. Any other use of details held by the Lodge requires the consent of the individual concerned. For example, the Lodge mailing list should not be used to circulate requests for charity donations except for those on the list who have provided their consent to receiving such requests.

### How can members contact each other?

Members are free to contact other members but unless they are acting on Lodge business they may not use the Lodge's mailing list for this purpose. The Lodge Secretary must not use the mailing list to divulge a member's contact details to anyone without consent. If member A wishes to contact member B but does not know his contact details, member A may ask the Lodge Secretary to be put in touch. The Lodge Secretary can then send member A's details to member B, inviting him to contact member A directly if he wishes.

### What personal data can I include in Lodge Summons?

For each piece of personal data on your summons you need to be able to answer the following three questions with a "yes":

1. Does it have a legitimate purpose? A purpose will typically be legitimate if the data will be used for one of the Lodge's normal activities as a membership organisation.
2. Is it necessary for that purpose? It will typically be necessary if there is no other practical way to achieve the same result which would involve less use of personal data.
3. Is including it a fair balance of members' rights against the Lodge's rights? It will typically be a fair balance if it falls within what members of your Lodge would expect to happen to their data.

### Example 1 – information about candidates

For example, the summons for a meeting at which an initiation is proposed must include certain information about the potential new member, as specified in Rule 164(b). The purpose is to inform members about who is being proposed and enable them to make a decision. Only information necessary for that purpose should be included. By way of illustration it is unlikely to be necessary to state a candidate's date of birth because the Rule already requires the age to be stated and the additional information contained in a date of birth is unnecessary for the purpose of informing members about the candidate.

### Example 2 – names of all Lodge members

Some Lodges include a list of members names on all of their summonses. The purpose of including names is so that all members are reminded who is currently a member of the Lodge and informed of any changes, ahead of the next meeting. There is no easier, less obtrusive, method to achieve this and so it is necessary for the purpose. Many Lodges will consider that including the list of names represents a fair balance of individual rights against the Lodge's rights.

### Example 3 – contact details for all Lodge members

Some Lodges include all of their members' contact details on their summonses. This is for the legitimate purpose that they may contact each other about Lodge business. However, it is unlikely that including contact details in this way is necessary or represents a fair balance of members' and Lodge rights. There are other effective ways for members to obtain each other's contact details which better protects members' privacy (for an example, see "How can members contact each other?" above).

### Example 4 – Lodge Officers

Summons can include the contact details of Lodge officers who members may need to contact, such as the Secretary or the Treasurer. This is legitimate, necessary and represents a fair balance of the officers' rights against the Lodge's rights: the officer cannot fulfil his duties if members cannot easily contact him. If an officer does not want his contact details to be published then he should establish a generic email address (e.g. secretaryofABCLODGE@gmail.com) and forward all mail from that to his personal email address.

### What if the Lodge members want to include a list of contact details on the summons?

If the Lodge cannot justify including members' contact details on its summons following the test set out above, then it has a choice. It can remove the details from its summons or it can include them but with the members' explicit consent. In that case the summons can only include the contact details of those members who have actively provided their consent to the publication of their contact details on the summons. A member can remove that consent at any time.



**What else do I need to think about for a Lodge Summons?**

If a Lodge circulates its summonses by email, care should be taken not to reveal each members' email address to other members. This means that the email address of the recipients should be put into the "bcc" box by whoever is sending the email.

It is inadvisable to attempt to set out a full data protection statement on a summons. A Lodge Secretary may wish to remind members about data protection verbally or in writing at the bottom of Lodge summonses. There are many ways of doing this but the following example may be appropriate:

"This summons contains personal details and so should be stored securely and shredded when no longer needed. The Lodge's data protection notice is available (from the Lodge secretary) or (at [www.lodge-website.org.uk](http://www.lodge-website.org.uk).)"

**What about sending summonses to third parties?**

A full copy of each summons must be sent to every Lodge member and, if applicable, to your Province/District.

Some Lodges customarily circulate their summonses to their guests or to other local Lodges. Where those summonses contain information about candidates that information should be redacted from all copies sent to guests or other Lodges.

**How can I comply with Rule 158 if a candidate's details are confidential?**

Rule 158 requires a Lodge to make enquiries about a candidate for initiation from the Masonic Authority with jurisdiction in the relevant area. Lodges may rely on that Masonic Authority to comply with data protection law and, in particular, to remain within the scope of the consent given by every candidate on their application form.

**What about the details of a local candidate?**

A Lodge must not publish the candidates details anywhere where non-Masons may see it, such as on the notice board of a local Masonic Centre. It may be justifiable for the purposes of assessing the candidate's application to circulate their details to local Lodges or other relevant Lodges. A Lodge should not circulate a candidate's details indiscriminately to all other Lodges within the Province/District except for the smallest Provinces and Districts which may take a different view.

**A Candidate has a criminal conviction – should I give details to the members before we vote the ballot?**

No. If a candidate has declared matters which require a Grand Secretary's certificate in accordance with Rule 164(a)ii then that certificate shall be read out in open Lodge immediately before the candidate is proposed and immediately before the ballot.

**Does my Lodge need a Data Protection Notice?**

Yes, all Lodges should have a data protection notice.

**What should members do before posting on social media?**

Any person wishing to post a photograph or other personal details of another member of the Lodge in connection with Freemasonry should obtain the consent of that member in advance.

**I have passed on my records and logons to my successor as Lodge Secretary – is there anything else I need to do?**

Ensure that you have permanently deleted any mailing lists or other personal data of members that you held to perform your duties as Lodge Secretary.

Encourage your successor to change the passwords on any email address, websites or other online accounts which are connected to the Lodge Secretary from time to time rather than an individual.

**Does my Lodge need to take professional advice?**

If a Lodge processes personal data for reasons outside normal Lodge business then it will need to consider what the lawful justification is for that processing. Before spending money on professional advice, it is worth considering the content on the data regulator's website, [www.ico.org.uk](http://www.ico.org.uk), or using the ICO's helpline for small organisations on 0303 123 1113.

Beware that many advisers may not understand how data protection law applies to not-for-profit membership organisations or members' data and that a minority try to sell products and services they have developed that are not tailored to a Masonic Lodge's needs. By contrast, many professional advisers will be able to assist those Lodges that need professional advice because of personal data they process relating to their commercial interests or property holdings.

**My data protection question is not answered here – what should I do?**

At first instance please contact your Province/District.

Please note that separate FAQs have been published for Lodge Almoners.

*These FAQs are intended to help share knowledge and guidance but are not legal advice and are not a substitute for independent legal advice on compliance, if you consider that necessary. Lodges which are not based in the UK will need to consider the impact of any local laws concerning data protection.*

United Grand Lodge of England

23 January 2019



## Data protection FAQs for Almoners

This guidance is written for Almoners to assist them to comply with data protection legislation. It is additional to data protection guidance that has already been circulated but is focussed on issues that arise specifically for Almoners. The nature of an Almoner's duties means that sensitive personal data such as healthcare or financial information may be processed. This means that Almoners need to think carefully about data protection and privacy.

### Obtaining consent

#### Can I update the Lodge on a Brother's health?

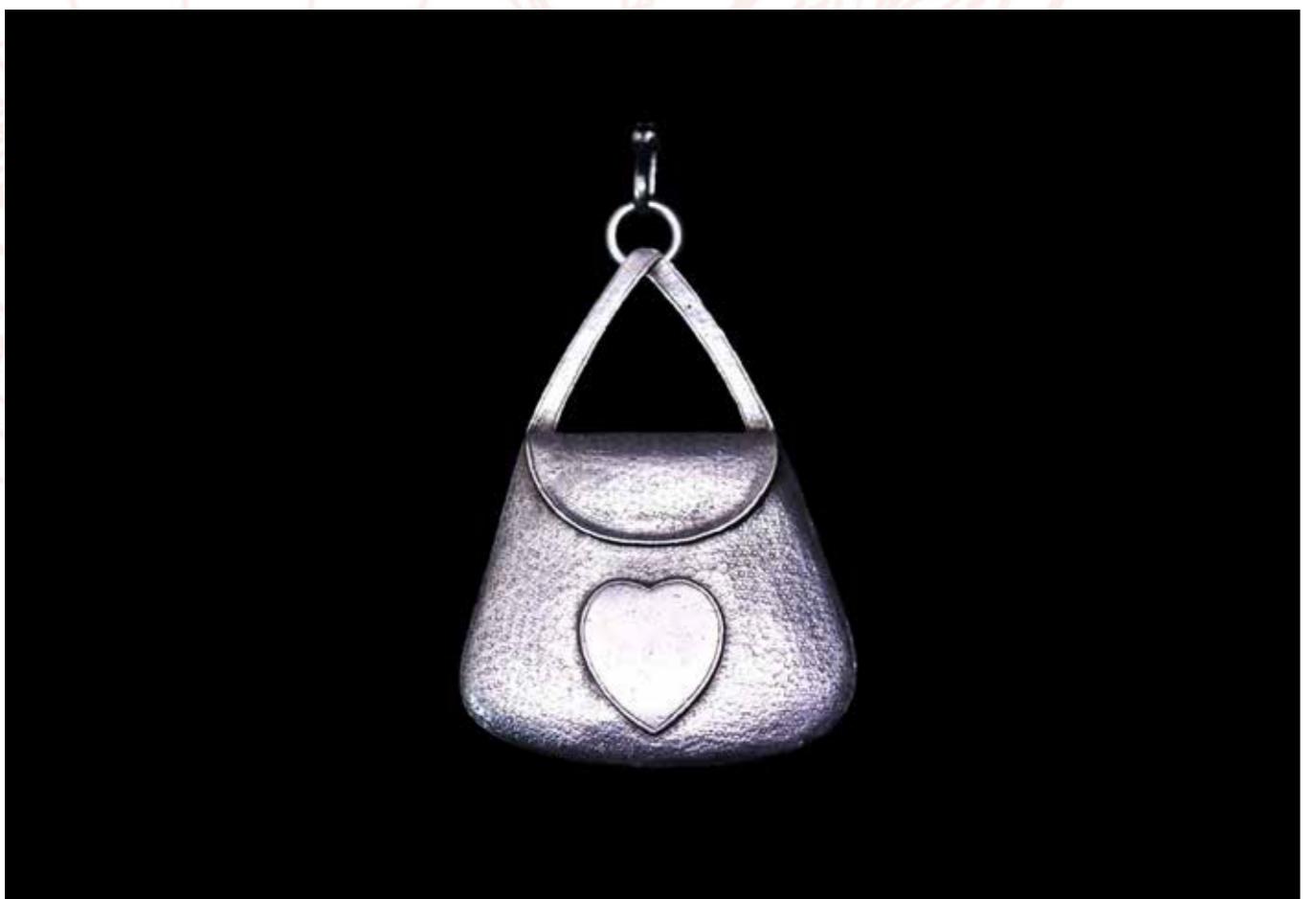
You should never give an update to a Lodge on a Brother's health without the express consent of that Brother. Many Brethren may expect that what they share with the Almoner will be reported to the next Lodge meeting, but this must not be assumed.

#### Can I update the Lodge on a Brother's wife's health?

See following.

#### How can I obtain consent?

Consent will normally be oral, but could also be in writing or even by gesture.



#### How specific does the consent need to be?

Consent must be specific about how the details will be used. A consent given by saying "*you may share my details with the Lodge*" is insufficient. The following examples of consent could be specific enough for your purposes:

*"I'm happy for you to report on my health to the Lodge in the usual way"*

*"Yes, include my health details in your written report"*

*"Do update any members who ask and let them know I hope to be at the next meeting"*

*"Please use my financial details to complete the application for charitable relief"*

**Almoner:** *Are you happy for me to provide a spoken update on your health to the Lodge and to pass on anything else you tell me about it today to any members who ask?*

**Brother:** *Yes.*

#### How should I record oral consents?

Oral consent will normally be sufficient for almoners and it will rarely be appropriate in the circumstances for you to ask for written consent. If you rely on oral consent then record in your notes for each case:

1. Who consented;
2. When they consented;
3. What they consented to; and
4. How they consented. For example, your notes might read "16/6/18 Brother Smith said "yes" to oral report to Lodge of his health".

#### What information do I need to provide to the Brother I am visiting?

If you are seeking oral consent to pass on his details to your Lodge then a request for consent could be structured as follows:

1. Explain that you are the Lodge Almoner (unless he already knows this);
2. Provide your contact details (unless he already has these);
3. Explain that you won't record or pass on any information without his consent.
4. Ask if he consents to you using the information he has provided to you to give an oral/written report at the next Lodge meeting and/or an update to members who ask after him.
5. Record his response in your notes.
6. Remind him that he can change his mind at any time by letting you know.
7. Explain that if he is ever unhappy about the report then he should let you know. Arguably, you should also explain that if he is unhappy with your response to any complaint then he has the right to complain to the Information Commissioner's Office (ICO). However, this may not naturally fit into a normal conversation and so see below for exceptions.



**Can I provide this information in writing instead?**

Yes. You could if you wish provide the information set out in the previous answer on a calling card/ piece of paper. If you already provide contact details by way of a business card then you may wish to set out these details on the back of the card. This would save you from having to give the information orally during a visit.

**I'm happy providing this information orally except for the bit about the ICO. Can I provide this in another way?**

If your Lodge summons normally contains your contact details as Lodge Almoner, you could arrange for a sentence to be added in small print underneath along the lines of; "Please contact the Almoner if you are unhappy with how he uses your data. If he cannot resolve your complaint you have the right to complain to the Information Commissioner's Office at [www.ico.org.uk](http://www.ico.org.uk)."

Alternatively this information could be included in your Lodge's data protection notice or on a calling card (see previous answer).

**What if a Brother cannot give his consent?**

If the Brother has difficulty understanding your request for consent or is incapable of giving his consent then you cannot collect a valid consent unless his spouse or carer is prepared to consent on his behalf.

**But he is my friend – why can't I gossip about him like I do with all of my friends?**

If you receive information as a friend and pass it on as a friend then you are free to act as you think appropriate. Data protection laws apply to all information you receive or share in your capacity as Almoner. Whenever you speak during a Lodge meeting, submit written reports to the Lodge or email all Lodge members you are acting as Almoner.

**Reporting to my Lodge****Should I report orally or in writing to my Lodge?**

As long as you have consent for what you do, you can provide an oral or written Almoner's report to Lodge meetings. However, from a data protection perspective it is far preferable that you report orally. It is unlikely that every member of a Lodge will store securely and then destroy effectively a written Almoner's report.

**What if we don't have time at meetings for oral Almoner's reports?**

If a Lodge has decided to use written Almoner's reports because oral reports are too time consuming or are not of universal interest then consider alternative approaches to make oral reports work. For example, you could report orally very briefly on each case in Lodge, or just list the names of those about whom you have updates, and invite those Brothers who would like more detail to come and speak with you afterwards.



©Museum of Freemasonry, London

**My Lodge would still prefer to use written reports – is this legal?**

Yes, a Lodge can circulate a written Almoner's report if it wishes. However, the report must contain a warning that it contains highly sensitive personal data and so must be stored securely and destroyed (or deleted) after use. The Almoner should also take extra care to record the consents of the subjects of his report and ensure that they understand that their data will be published in writing and circulated to all of the Lodge.

**How should an oral Almoner's report be minuted?**

Lodge minutes of any meeting at which an oral report was given should not include any sensitive healthcare information. For example, a typical report could be recorded in the minutes as "The Almoner gave an oral report".

**What about details of a deceased Brother?**

Once a Brother has died then data protection legislation no longer applies to his details and instead normal etiquette applies. You are free to make such oral or written announcements as are appropriate to inform your brethren of the death, and the matter can be recorded in the minutes as the Secretary sees fit.



## Consents from non-Masons

### Can I use or store details of widows or other dependants?

If you wish to collect or store details about a widow or other dependants of a deceased Brother then you must obtain the consent of that widow or dependant. If they are a child, the consent of their parent or guardian is required. The consent should be clear about why you are keeping the details e.g. "to provide an update to the Lodge on your circumstances and how we are assisting you" or "to contact you to arrange my quarterly visits to you".

### Can I use or store next of kin details?

If a Brother provides next of kin details to you or asks you to include in an Almoner's report details of their wife/partner's health then you should ask the Brother if he has consent from his wife/partner to allow that information to be included in the report, or if you are in contact with the wife/partner you may ask them directly.

## Storing personal data

### What do I need to do to keep data I hold as Almoner safe?

You must think carefully about how you store personal data that you hold as Almoner. You must take appropriate measures to keep the data safe and secure. If you keep any notes about Brother's health on your computer then the notes should be password protected. If you keep paper notes then avoid taking them anywhere if they are not needed for that journey. For example, if you are going on a visit to a hospital then do not take with you papers relating to other Brothers who are not in that hospital.

### I have received a request for deletion – can I contest it?

If any person whose personal data you store in your role as Almoner asks you to delete that data then you must do so immediately. This includes not just requests from Masons but also requests from other people such as next of kin or widows.

### My data protection question is not answered here – what should I do?

At first instance please contact Metropolitan Grand Lodge/ your Province/ your District.

***These FAQs are intended to help share knowledge and guidance but are not legal advice and are not a substitute for independent legal advice on compliance, if you consider that necessary. Lodges which are not based in the UK will need to consider the impact of any local laws concerning data protection.***

10 August 2018

## District / Province of [NAME] Your data

This notice is for all candidates and Freemasons of the District / Province of [NAME]. It applies to the processing of your personal data by the District / Province.

**Section I** sets out the purposes for which your data will be used by the District / Province if you are a candidate to become a Freemason.

**Section II** sets out the purposes for which your data will be used by the District / Province if you are a Freemason.

Please note that your personal data will also be processed by your Lodge(s) and the United Grand Lodge of England as separate data controllers and so you are also referred to their respective Data Protection Notices.

### I. Use of your data during your application to become a Freemason

As a candidate to become a Freemason, you consent to the processing, retention and sharing of your personal data for the purpose of assessing your membership application and any other Masonic applications you may make.

You can withdraw your consent and request erasure of your data at any time prior to your initiation by notifying your proposer and seconder that you wish to cancel your application.

### II. Use of your data after you become a Freemason

As a Freemason your data will be processed, retained and shared for any reasonable purposes required by the Book of Constitutions or the bodies it sanctions from time to time. These purposes include, but are not limited to, the following purposes:

1. Assessing any Masonic applications you make;
2. Registering you as a member of Freemasonry;
3. Receiving communications to which you are entitled as a Mason;
4. Recording the progress of your career in Freemasonry; and
5. Masonic disciplinary processes.

You may stop your data from being used by the District / Province by resigning from all Lodges in the District / Province. The District / Province is at [postal address]. Please contact its data protection officer by post or email to [District / Province data protection email address] if you wish to:

1. Object to the District / Province processing your data;
2. Request access to your data; or
3. Request rectification of your data.

The legal bases on which your personal data will be used in accordance with this **Section II** are:

1. The legitimate interests of the District / Province as a not for profit membership organisation; and
2. The fulfilment of contractual obligations owed to you by your Lodge supported by the District / Province.

In this notice "Book of Constitutions" means the General Laws and Regulations for the Government of the Craft of the United Grand Lodge of England from time to time.



## [LODGE NAME] Your data

This notice is for all candidates and Freemasons of [LODGE NAME]. It applies to the processing of your personal data by the Lodge.

**Section I** sets out the purposes for which your data will be used by the Lodge if you are a candidate.

**Section II** sets out the purposes for which your data will be used by the Lodge if you are a member.

Please note that your personal data will also be processed by the United Grand Lodge of England and the [Province of [name]]/District of [name] as separate data controllers and so you are also referred to their respective Data Protection Notices.

### I. Use of your data during your application to become a Freemason

As a candidate to become a Freemason, you consent to the processing, retention and sharing of your personal data for the purpose of assessing your membership application and any other Masonic applications you may make.

You can withdraw your consent and request erasure of your data at any time prior to your initiation by notifying your proposer and seconder that you wish to cancel your application.

### II. Use of your data after you become a Freemason

As a Freemason your data will be processed, retained and shared for any reasonable purposes required by the Book of Constitutions or the bodies it sanctions from time to time. These purposes include, but are not limited to, the following purposes:

1. Assessing any Masonic applications you make;
2. Registering you as a member of Freemasonry;
3. Receiving communications to which you are entitled as a Mason;
4. Recording the progress of your career in Freemasonry; and
5. Masonic disciplinary processes.

You may stop your data from being used by the Lodge by resigning from the Lodge. The Lodge is at [postal address]. Please contact the Lodge Secretary by post or email to [Lodge Secretary's email address] if you wish to:

1. Object to the Lodge processing your data;
2. Request access to your data; or
3. Request rectification of your data.

The legal bases on which your personal data will be used in accordance with this **Section II** are:

1. The legitimate interests of the Lodge as a not for profit membership organisation; and
2. The fulfilment of contractual obligations owed to you by your Lodge.

In this notice "Book of Constitutions" means the General Laws and Regulations for the Government of the Craft of the United Grand Lodge of England from time to time.

## Data Protection Policy

This data protection policy regulates how the Province of [NAME] processes and stores personal data of its members. It applies to all employees, officers, members and volunteers of the Province. Its purpose is to ensure that the Province complies with the law and with high data protection standards.

In this policy "personal data" means any recorded information which identifies a living individual.

### 1. Purposes

As a membership organisation the Province processes, retains and shares personal data of members for the purposes set out in the Data Protection Notice. Where the Province employs or contracts with a member it may also process, retain and share personal data of that member for all lawful purposes related to that employment or contractual relationship.

The Province shall not collect or store personal data of members for any other purposes.

### 2. Appointment of a Data Protection Officer

The Province shall appoint a Data Protection Officer who will oversee compliance with data protection law and will act as a point of contact for members and the Information Commissioner's Office (the "ICO"). The Data Protection Officer shall have a direct line of communication with the Provincial Grand Master and shall have, or shall undergo training to ensure that he has, knowledge of data protection law and practices.

### 3. Members' data rights

A member may request that the Data Protection Officer:

- a) Provides him with a copy of all personal data that the Province holds about him. The Data Protection Officer shall promptly provide a copy of all information required to be disclosed by law.
- b) Rectifies any incorrect personal data held by the Province about him. The Data Protection Officer shall promptly consider such a request and respond to it in accordance with the law.
- c) Stop the Province from some or all of its processing of his personal data. The Data Protection Officer shall promptly consider such an objection and respond to it in accordance with the law.

### 4. Deletion of personal data

A member may resign from all lodges in a Province at any time. After it has processed such resignation(s) the Province shall delete personal data that it holds about that member as set out in the Data Protection Notice.



## 5. Sharing data with third parties

As a membership organisation the Province shares:

- a) Personal data of its members with the United Grand Lodge of England; and
- b) Personal data of members of each Lodge in the Province with that Lodge,

as required by the Book of Constitutions or bodies it sanctions from time to time. It will not share personal data of members for any other reason unless it has the consent of the relevant member.

## 6. Data Protection Notice

The Province shall publish a Data Protection Notice so that it is available to members. The Notice shall comply with the requirements of data protection law and among other things shall inform members how their personal data will be used by the Province and how they may contact the Province's Data Protection Officer.

## 7. Data security

The Province shall periodically review the security of its records and processing activities and shall take appropriate steps to ensure the confidentiality, integrity and availability of personal data that it holds.

## 8. Registration with ICO

The Province shall maintain its annual registration with the ICO.

## 9. Reporting breaches to the Data Protection Officer

Actual or potential breaches of this policy, or of data protection law by the Province, shall be reported immediately to the Data Protection Officer. Breaches shall be reported if required by the Data Protection Officer to the ICO or to the member(s) whose data is affected. Normally the Data Protection Officer shall not report breaches without prior consultation with the Provincial Grand Master and Provincial Grand Secretary.

Date policy adopted:

## Year Books

This general guidance is compiled in response to a number of queries from Provinces and Districts about how data protection law applies to their Year Books.

A Province/District must not publish and living person's details without a lawful basis. In the case of a Provincial or District Year Book, there will normally be only two possible lawful bases which might apply:

1. Consent; or
2. The legitimate interests of the Province/District.

### 1. Personal details – consent

Consent will have been given if each person whose details appear in the Year Book has been given a choice and actively confirmed that they consent to those details appearing. For example, a Province or District could send out an annual form or email to each person:

- a) Listing their details which it proposes to print in the Year Book;
- b) Asking the recipient to correct any out of date/incorrect details; and
- c) Asking the recipient to consent to those details being published in the Year Book. Consent must be express and failure to respond cannot constitute consent.

### 2. Personal details – legitimate interests

If consent is not obtained, the alternative is to rely upon the Province's/District's legitimate interests. Each piece of personal data that is published on this legal basis must be justified as:

- a) Pursuing a legitimate aim;
- b) Necessary to achieve that name; and
- c) Representing a reasonable balance between the rights of the individual and the rights of the Province/District and its members taken as a whole.

It is likely that details customarily published in a Year Book are done so to pursue a "legitimate aim". The details are published to facilitate the administration of the province/District as a membership organisation and of Freemasonry more generally. It is perhaps unlikely that personal details would be published for any aims which are not legitimate but, as an example, it would not be legitimate to include additional personal details in the Year Book for the purpose of increasing the revenue from advertisements printed in that Year Book.

The "necessary" and "reasonable balance" tests need careful thought when compiling Year Books. If a Year Book listing Lodge officers and their contact details is available on a website that can only be accessed by Masons in the Province/District who enter a password, then publishing the standard Year Book data in that way probably would be necessary and represent a reasonable balance.

By contrast, if the data is to be printed on paper or available on a public website then it is harder to pass the test as it may not be "necessary" or represent a "reasonable balance" to publish members' personal data in this way. Communications between members can be facilitated in



other ways that intrude less on members' privacy for example, by members approaching their Lodge Secretary when they need to be put in touch with someone.

The legal position will depend on the exact details published and on how the Year Book is circulated and used. However, by way of general guidance, where a Year Book is being published on paper or on a website which is accessible by non-members, the inclusion of the names and position of Provincial/District Grand Officers and of Lodge Secretaries within the Province/District could probably be justified together with their personal email addresses or telephone numbers. It is considered unlikely that a Province/District would be able to justify printing the names of other Lodge officers or any residential addresses. However, a Province/District must reach its own decision based on its understanding of what is necessary in its local context.

### 3. Non-personal details

The above advice only covers personal data. Provinces can publish non-personal data such as a Lodge meeting address or a telephone number operated by the Provincial/District office. One solution is for Lodge secretaries to use generic email addresses ([secretary@ABC Lodge.org.uk](mailto:secretary@ABC Lodge.org.uk)) and automatically to forward emails from that account to the personal account of the current secretary. That generic email address can then be published by the Year Book because it is not personal data.

### 4. Avoid data harvesting

Online Year Books can be much easier to copy than paper Year Books. Where a Year Book is published on a website (whether behind a logon or public) there is a risk that the directory is downloaded wholesale into a database and then sold or used for improper purposes. It is therefore preferable to provide Year Book information through a search function which returns perhaps no more than ten records at a time. This is so that users can easily search for what they need but if someone wished to harvest the information they would have laboriously to copy the entries ten at a time. Some Provinces/District may conclude that the resources required to put in place a search function of this nature are not justified when balanced against the lower costs but higher risks of making the entire Year Book available in other ways, such as in a pdf available to members. However, all Provinces/Districts which publish electronic copies of their Year Book should consider how, if at all, the risks of data harvesting from the Year Book can be minimised.

### 5. Other Orders

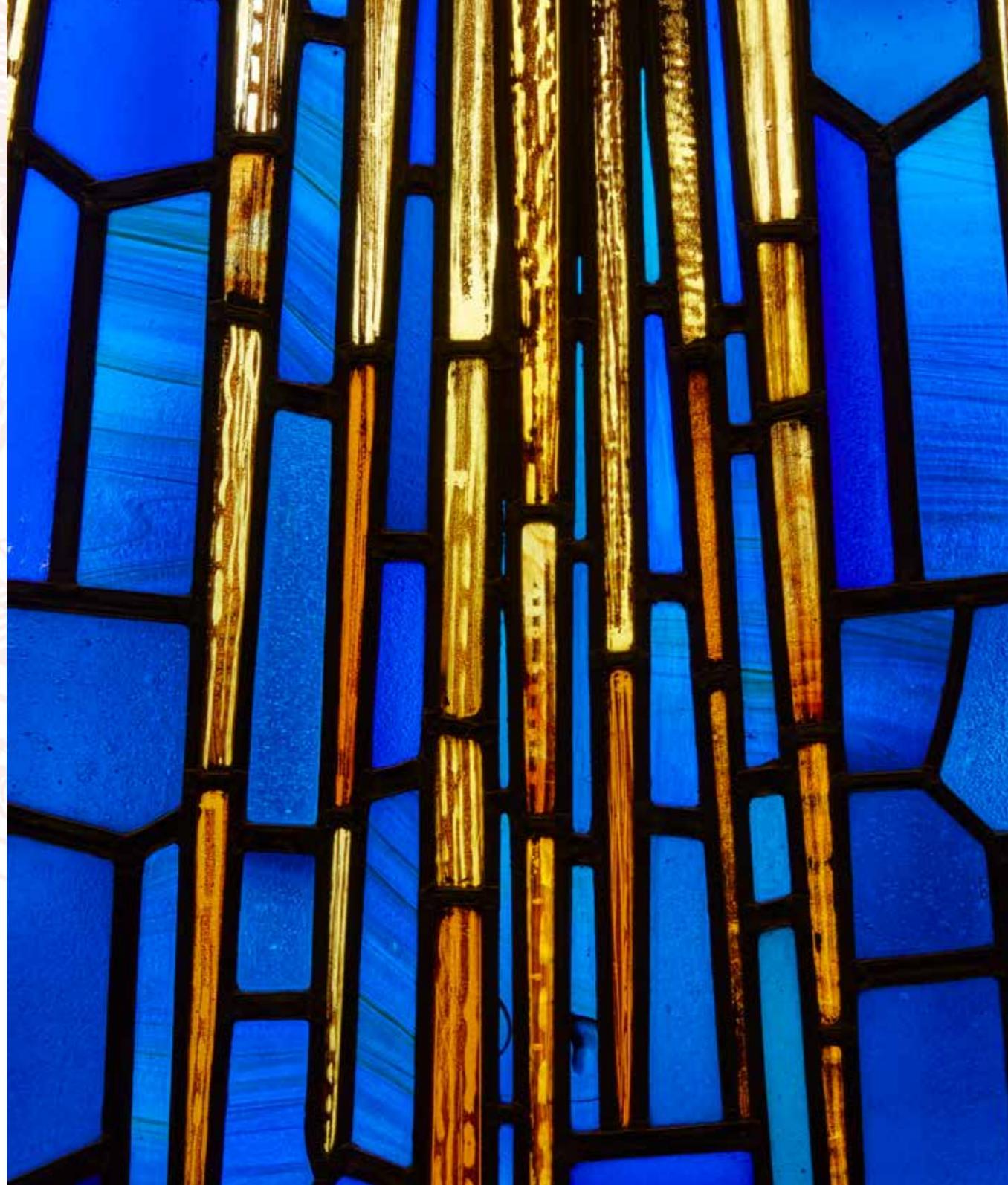
Provinces/Districts must not print the personal details of someone in another Masonic order without that person's consent, or confirmation from the relevant Provincial/District Grand Secretary (or equivalent) confirming that all necessary consents have been obtained. This does not apply if the details are already in the public domain (for example, that Order has a public website listing those details).

This document is intended to help share knowledge and guidance but is not legal advice and is not a substitute for independent legal advice on compliance, if you consider that necessary.

United Grand Lodge of England

10 December 2018





As all deaths of Grand Officers are printed in the Papers of Business for, and the subsequent minutes of, all Quarterly Communications, the information provided should be independently confirmed by UGLE.

Upon receiving notification of the death of a Grand Officer within the District, the notification of his death should be entered onto ADelphi as soon as possible.

This can be done by accessing the deceased personal record on ADelphi and under 'menu actions' select 'decease a member'. (If a date of death is not known at this stage, this can be left blank.) Please indicate the source of information from the drop down menu and then save.

If further useful information is known (e.g. Funeral date, other sources of information etc.), enter details in the text free box by clicking 'Member Comments'.

If you have no access to ADelphi, then inform Masonic Services by email as soon as you are notified and they will do this for you.

*[For your information on the next steps taken by Masonic Services:-*

*The record should then show "Deceased (not confirmed by UGLE)".*

*Masonic Services will then make further enquiries in order independently to confirm the information. If the source of the original information is, for example, a close family member this would be an indisputable first source.*

*Once this has been confirmed, Masonic Services at UGLE will confirm the death on ADelphi and arrange for the inclusion in the obituary section of the relevant Paper of Business.]*

January 2021

Masonic Services





## Candidates for initiation or joining when unattached and disclose a conviction

### Rule 164, Book of Constitutions refers:

When a candidate makes an application to be initiated into a Lodge or to join a Lodge as an unattached Mason and discloses a conviction or form of disciplinary proceedings, the partially completed Registration Form should be forwarded to UGLE for consideration as to whether the Certificate of the Grand Secretary should be granted. Details to be fully completed on the form are:

- Page 1 and 2 - by the candidate in his own handwriting
- Page 3 - by the Proposer, Seconder and Worshipful Master

Copies of relevant documentation surrounding the conviction should be enclosed together with a covering letter from the candidate.

When forwarding the above to UGLE, District office should also state whether the application has the support of the District Grand Master.

Until such time as the Certificate of the Grand Secretary is granted the Lodge concerned must not proceed to propose the candidate for membership or initiate him.

Each year a letter issued by the Grand Secretary is forwarded to Lodge Secretaries giving guidance as to the procedure to be followed when a candidate discloses a conviction.



## Declaration of Offences

### SAMPLE

Dear Brother Secretary

#### Registration Forms: Qualified Declarations

Masonry requires Brethren to conform to the higher standards of personal behaviour. Hence a Candidate for initiation (or unattached joining or re-joining members) is required to make an unqualified declaration that he has not been convicted of a criminal offence or been the subject of disciplinary proceedings before a professional or similar tribunal. If he cannot make such a declaration, he must give specific details as to why this is not possible so that the Lodge Secretary may seek guidance from me through his District, or equivalent, Grand Secretary. If the matters disclosed do not constitute a bar to his Initiation or joining then a Certificate will be issued which must be read out in open Lodge both at the time of his proposition and prior to a ballot being taken. The issuing of a Certificate should not be taken as an indication that the Candidate ought to be elected, that is for the Lodge to decide. However, if a Certificate is not issued for a Candidate, he must not be proposed in Open Lodge and he must be informed of the fact as soon as possible.

This procedure, which must be followed in all cases where a qualified declaration is made, will serve both to protect Lodges from allegations of admitting unsuitable candidates, and to ensure that the members of a Lodge are able to exercise their discretion in an informed way when a ballot is taken. Failure to follow this procedure strictly may result in Masonic disciplinary sanction.

It is recommended that Secretaries of Lodges do not issue Registration Forms to a potential candidate for initiation, his proposer or seconder until all three have had an opportunity to study the guidance given in the blue form issued with the Registration Form. Lodges are recommended to refer all applications for initiation to the Lodge Committee *before* a formal proposal is placed before the Lodge. If the Lodge's By-laws do not provide for a Committee (see Rule 154, Book of Constitutions) it is recommended that they be amended so that a Committee may be formed. In any event very careful consideration should be given by the Lodge Committee (or where there is no Lodge Committee, by the Master of the Lodge) before supporting any application where the Candidate has made a qualified declaration on the Registration Form.

January 2021

Grand Secretary



In recent years it has become evident from the number and variety of disciplinary complaints reported to Grand Lodge that there are some Brethren who are unable or unwilling to conform to the high standards expected of a Freemason. It is important not only that those few Brethren who have fallen short of the standards expected of a Freemason should be penalised but also that care should be exercised before a candidate is proposed for initiation.

Accordingly, the Registration Form was amended in 1991 and 1998 (and again in 2001 and following the introduction of GDPR to comply with the Data Protection Acts) so as to require a candidate for initiation to make an unqualified declaration that he has not been convicted of a criminal offence or been the subject of disciplinary proceedings before a professional or similar tribunal. If he cannot make such a declaration, he must give specific details as to why this is not possible so that the Secretary of the Lodge may seek guidance (through the District Grand Secretary) from the Grand Secretary. If it is appropriate for the candidature to proceed, the Grand Secretary (or, in certain circumstances, the District Grand Master) will issue a certificate that the matters disclosed do not constitute a bar to his initiation, which must be read out in open Lodge at the time he is proposed and seconded, and again immediately before the ballot is taken. The fact that a certificate has been issued is not to be taken as an expression of opinion that the candidate ought to be elected; it is no more than confirmation that there is no overriding objection to the candidate being made a Mason. If the candidate is considered unsuitable, a certificate will not be issued, he may not be proposed in open Lodge, and he must be informed of the fact as soon as reasonably possible.

This procedure, which must be followed in all cases where an unqualified declaration cannot be made, will serve both to protect Lodges from allegations of admitting unsuitable candidates, and to ensure that the members of a Lodge are able to exercise their discretion in an informed way when a ballot is taken. Any Lodge or individual Brother responsible for a failure to follow this procedure strictly may be liable to Masonic disciplinary sanction.

It is recommended that Secretaries of Lodges do not issue Registration Forms to a potential candidate for initiation, his proposer or seconder until all three have had an opportunity to study the guidance on the Data Protection notice either in hard copy or online at [www.ugle.org.uk/data-protection-notice](http://www.ugle.org.uk/data-protection-notice). Indeed, if they do not already do so, Lodges are recommended to refer all applications for initiation to the Lodge Committee before a formal proposal is placed before the Lodge. If the Lodge's By-laws do not provide for a Committee (see Rule 154, Book of Constitutions) it is recommended that they may be amended so that a Committee may be formed. In any event very careful consideration should be given by the Lodge Committee (or where there is no Lodge Committee, by the Master of the Lodge) before supporting any application where the Candidate has made a qualified declaration on the Registration Form.

## Registration Form

### Certification of Offences Disclosed by Candidates

1. Since 1998 when any candidate for initiation (or unattached Brother seeking to join a Lodge) has been unable to make an unqualified declaration on page two of the Registration Form, the Form has had to be sent to Freemasons' Hall for certification that the matters disclosed do not constitute a bar to initiation.
2. The Board of General Purposes has taken account of the views of District Grand Masters who feel that this certification need not be carried out centrally in every case, but could be delegated to Districts as the case may be. The Board has accordingly decided that for the future a Provincial Grand Master (but only a Provincial Grand Master) may, if he is satisfied, sign the Certificate instead of the Grand Secretary in certain cases.
3. The Board is clear that the present system must continue to apply in any case involving dishonesty, violence or a racist or sexual element. A District Grand Master may, however, sign the certificate in the case of a candidate who discloses only:
  - a) Fixed penalty offences which did not result in an appearance in Court; and/or
  - b) Spent convictions for offences under the Road Traffic Acts which are triable only by a Magistrate's Court and which are not punishable by imprisonment; and/or
  - c) A single unspent conviction for an offence (other than one covered by (a)) under the Road Traffic Acts which is triable only by a Magistrate's Court and which is not punishable by imprisonment.
4. The Board hopes that this delegation will allow the great majority of cases to be dealt with locally without the substantial risk of damage to the reputation of the Craft.

January 2021

Deputy Grand Secretary





### Rule 173, Book of Constitutions

- a) No Lodge of which he is not a member shall pass or raise a Brother who has been initiated in another Lodge except at the written request of the Master (or in his absence a Warden) and the Secretary of the Lodge in which he was initiated.
- b) In the case of a request by or on behalf of a Lodge under a recognized Grand Lodge to have a degree conferred on a Brother in a Lodge under the Grand Lodge, the request must be countersigned by the Grand Secretary of the recognised Grand Lodge and by him forwarded to the Grand Secretary for transmission to the Lodge, in which the degree is to be conferred.
- c) In the converse case of a request by or on behalf of a Lodge under the Grand Lodge to have a degree conferred on a Brother in a Lodge under a recognised Grand Lodge, the request must be countersigned by the Grand Secretary and by him forwarded to the Grand Secretary in which the degree is to be conferred.
- d) Whenever a Brother has been passed or raised under any of the provisions of this Rule a document certifying such passing or raising shall forthwith be forwarded to the Grand Secretary and to the Lodge to which the candidate belongs.





# District Grand Secretary's Handbook

## SECTION A

(CANDIDATE TO COMPLETE)

I, (NAME IN FULL) ..... , initiated in ..... ,  
Lodge No. ..... on the register of the ..... do solemnly declare that  
I have resigned from the above Lodge (and other Lodges of which I am a member under the same  
authority) and have thereby severed my connection with the said Lodge(s). I promise that I shall  
have no further Masonic contact with it or the ..... under whose  
jurisdiction it falls.

I further understand that in the event of this disclaimer proving to be false I shall be liable to  
suspension or expulsion in accordance with the Rules and Regulations of the United Grand  
Lodge of England.

Signature .....

Name (IN FULL) .....

Date .....

## SECTION B

This section must be completed and signed by the District Grand Master prior to the ballot being  
held for the above named candidate to be admitted as a joining member.

Approved for initiation into ..... Lodge No.....

(signed) District Grand Master

Date.....

***Once completed the entire Disclaimer must be returned along with the Registration Form and fee  
following the admission of the candidate above mentioned as an initiate.***

# Disclaimer

## SECTION A

(CANDIDATE TO COMPLETE)

I, (NAME IN FULL) ..... , initiated in ..... ,  
Lodge No. ..... on the register of the ..... do solemnly declare that  
I have resigned from the above Lodge (and other Lodges of which I am a member under the same  
authority) and have thereby severed my connection with the said Lodge(s). I promise that I shall  
have no further Masonic contact with it or the ..... under whose  
jurisdiction it falls.

I further understand that in the event of this disclaimer proving to be false I shall be liable to  
suspension or expulsion in accordance with the Rules and Regulations of the United Grand  
Lodge of England.

Signature .....

Name (IN FULL) .....

Date .....

## SECTION B

This section must be completed and signed by the District Grand Master prior to the ballot being  
held for the above named candidate to be admitted as a joining member.

Approved to become a joining member of ..... Lodge No.....

(signed) District Grand Master

Date.....

***Once completed the entire Disclaimer must be returned along with the Registration Form  
following the admission of the candidate above mentioned as a joining member.***

January 2021 – Member Services





### Dispensations required to be issued by the Grand Master

- Mastership of more than one Lodge simultaneously (Rule 115, Book of Constitutions refers) unless both Lodges are in the same District in which case the application should be made via the relevant District Grand Secretary.
- Provincial/District Grand Lodge meeting outside the Province/District (Rule 78, Book of Constitutions refers).
- Lodge holding a meeting in a place where no Metropolitan/Provincial/District Grand Master has jurisdiction (see Rule 142, Book of Constitutions for full details).
- Unattached Lodge holding a meeting in a place or on a day other than that named in its by-laws (see Rules 139(c) and 140, Book of Constitutions).

#### In order for a dispensation to be issued, the following is required:

- A communication, by letter or email, forwarded to Member Services – Registration giving full details of the dispensation required.
- A cheque for the current fee made payable to United Grand Lodge of England or details of the BACS payment made (see latest version of Letter of Instruction for current fee).
- If the dispensation is for a Mastership of more than one Lodge simultaneously, the Installation Return for the Lodge in which he is currently Worshipful Master must have previously been submitted to UGLE.

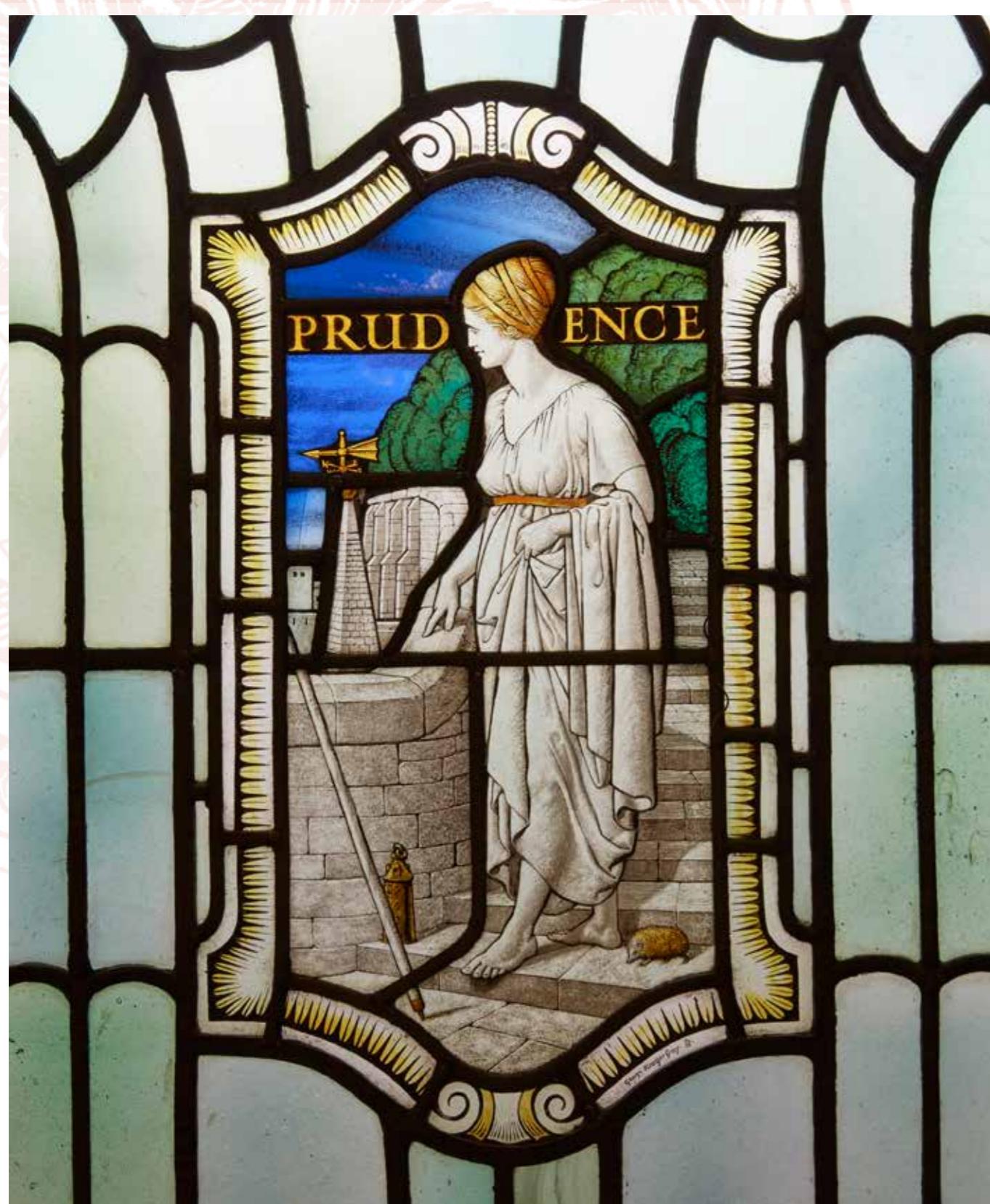
January 2021

Member Services





# District Grand Secretary's Handbook



## Erasures

1. The Lodge should give Notice of Motion, at a Regular Meeting, to surrender its Warrant, Centenary/Bi-Centenary Warrant(s) (if applicable) and Hall Stone Jewel (if any) and to dispose of its regalia, furniture, and assets, such as money in a Bank Account, Lodge Relief Chest, Post Office Account or Stocks and Shares etc. Care must be taken in case there is an old Trust Deed which carries limitations on disposals. Although it is not essential, it is advisable to include the Notice as an agenda item so that members of the Lodge are aware of the proposal.
2. At the next meeting the Lodge proposes, pursuant to Notice of Motion, that the Lodge surrenders its Warrant and disposes of its assets as above.
3. A closing Annual Return will be required giving FULL amounts of arrears due from any members.
4. The Lodge needs to inform the Masonic Charitable Foundation, and any of the other Charities if they are involved in payments to Brethren or their dependants.
5. If the Lodge has a Chapter attached to it, what is being resolved as to the Chapter's future?
6. As soon as possible after the final meeting, deliver the Closing Return and the following items to the District Grand Secretary's office in accordance with Rule 190:

**Immediately after the final meeting:**

- a) Warrant
- b) Hall Stone Jewel (if appropriate)

**After formal erasure by Grand Lodge**

- c) Minute Books
- d) Attendance Books
- e) Accounts Books
- f) Membership Book
- g) Declaration Book

**Notes**

1. If the Master of the Lodge is not already a Past Master beware of short service (Rule 9). Similarly, if Wardens have not served a full Year, their eligibility for election as Master may be affected (Rule 105a).
2. If the Lodge has any outstanding degree working, Interim Grand Lodge Certificates must be issued to candidates concerned to enable them to continue their Masonic career elsewhere.

January 2021 - Masonic Services





# District Grand Secretary's Handbook

**A**t the annual District investiture meetings certain appointments are made that are likely to be for more than a year. Some may also require registration fees to be paid. In both these cases an Executive Registration form will need to be submitted. The following are the offices that require the submission of this form.

## Craft

Deputy District Grand Master

Assistant District Grand Master

The above require the appropriate registration fee. (These fees are updated on 1<sup>st</sup> January each year.)

## The following offices require no fee:

District Grand Secretary

District Grand Charity Steward

District Grand Almoner

District Communication Officer

Upon the appointment of any person to one of these offices, the appropriate form needs to be fully completed and sent to Masonic Services (with appropriate fee, if required) as soon as possible. It is better that this is done in advance of the investiture meeting so that the changes can be made to ADelphi and this will automatically take effect on the day of Installation/Investiture but in any case as soon after the appointment starts as possible. This will ensure the ADelphi records are up to date and the Masonic Yearbook entries are accurate when published.

When the form is complete it should be sent to Masonic Services, who will make the necessary changes on ADelphi and in the yearbook. It can be sent by mail or scanned and sent electronically. If payment is by cheque please send it with the form. If payment is by BACS, please ensure the correct BACS reference is used.

# Executive Registration Forms

## - Guidance Notes for the completion of

### General Notes

Please complete the form as thoroughly as possible as any missing or incomplete information may result in delays in processing or the form being returned.

### Masonic Yearbook (MYB) Tick Boxes

These indicate whether or not the Appointee is consenting to have this particular piece of information published within the Masonic Year Book, which is regularly updated online and published in print on an annual basis.

Please note that any information provided on this form that does not have a tick mark in the corresponding MYB box will not be published and will only be recorded on ADelphi. If there are no MYB tick boxes selected then only the Appointees name, rank and date of appointment will be published.

### With effect from (date)

All appointments take effect (at the earliest) from the day following the vacancy caused by the previous Office Holder. As a general rule anyone who has retired from their post will have done so the day before the appointment of a new Office Holder.

### Signatures

With the expansion of GDPR Regulations it is essential that any information published has the consent of the individual concerned.

All forms must be signed by both the Appointee and the District Grand Secretary. Unless both of these signatures are obtained we will be unable to process the Form.

As the Form can be completed electronically digital signatures are acceptable.

### Version Notes

*From time to time it may be necessary to update these guidance notes. Please refer to the latest version which will always be distributed in conjunction with the Executive Registration Forms.*

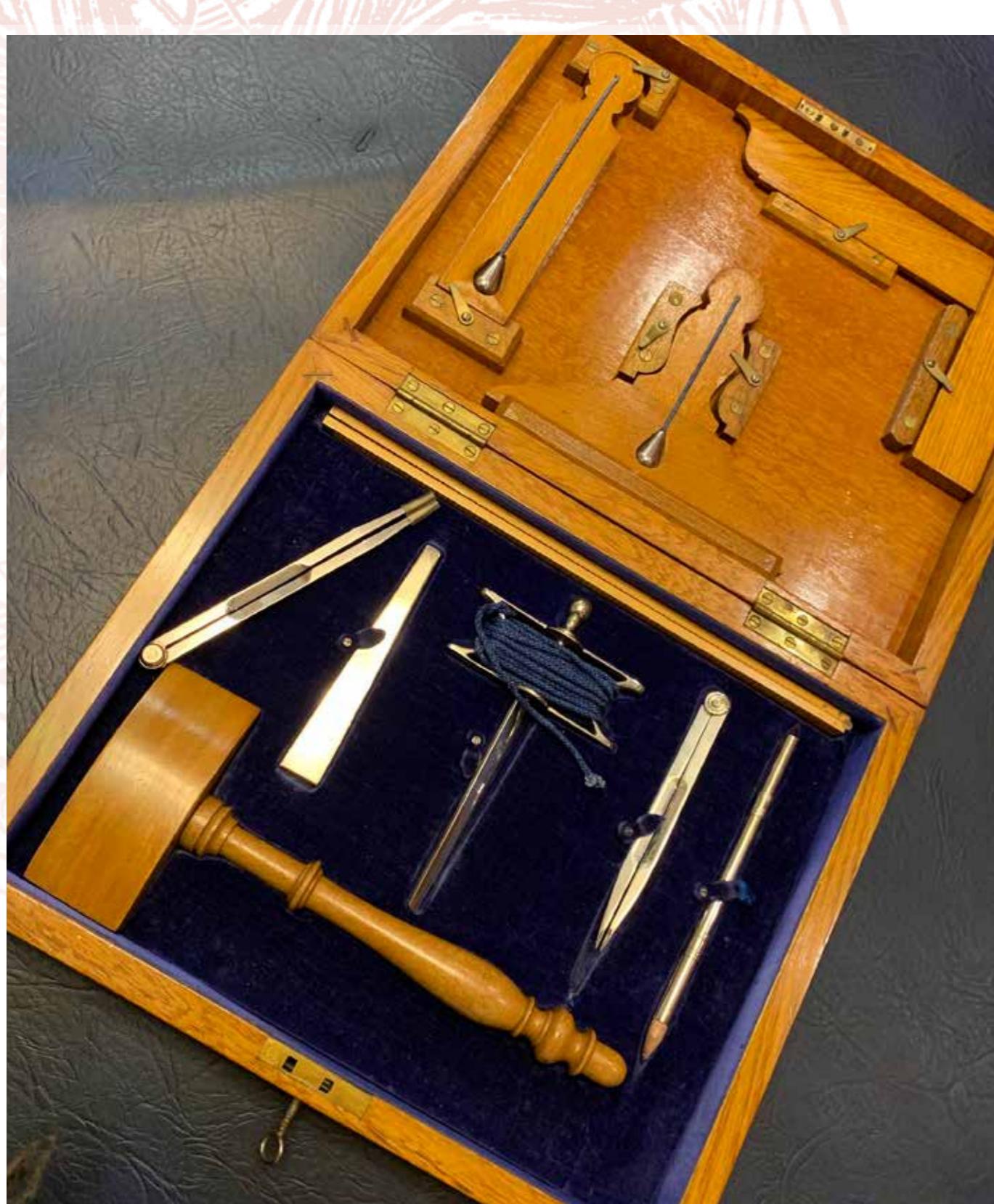
January 2021

Masonic Services





# District Grand Secretary's Handbook



## First and Second Degree Certificates - Issue of

### Candidates for joining a Lodge when only an Entered Apprentice or Fellow Craft

When a candidate makes an application to become a joining or re-joining member of a Lodge and cannot satisfy the requirements of Rule 163(c), Book of Constitutions because he has not been passed and/or raised, the procedure below must be followed.

**Note:** *If the Brother concerned is still a subscribing member of his Mother Lodge a First or Second Degree Certificate will not be issued. The provisions of Rule 173, Book of Constitutions should be followed.*

### First or Second Degree Certificates are only issued in exceptional circumstances and only when:

- The Brother was previously excluded from his Mother Lodge but has since cleared his arrears and wishes to re-join his Mother Lodge or to join another Lodge. A Clearance Certificate must be enclosed with the request.
- The Lodge has been erased.
- The Brother resigned from his Mother Lodge more than fifteen years before.
- The Brother is seeking to re-join his Mother Lodge.

### Unattached Brother (Rule 127(iii), Book of Constitution refers)

Under the provisions of this rule, an unattached Brother who has resigned from his Mother Lodge is subject to significant restrictions on his ability to attend any one Lodge until he becomes a subscribing member of a Lodge. If a Brother falls within the Rule the procedure to be followed is:

#### Entered Apprentice

The Brother should ask the Secretary of his Mother Lodge to request the District Office to identify two separate Lodges\* which are content to confer the second and third degrees under Rule 173. The Mother Lodge will then make a request (signed by the Secretary and Worshipful Master) to each of the Lodges to carry out the ceremony. (Sometimes the Mother Lodge may not need assistance from the District Office in identifying Lodges to confer the degrees.)

#### Fellow Craft

As above, but only a single Lodge will be required to confer the degree by request.

*\*The amendment to Rule 127 effective from December 2020 may in many cases obviate the need for one or both additional Lodges to confer degrees by request.*

Once he has been raised the Mother Lodge should request the issue of a Grand Lodge Certificate in the normal way. When the Brother is in possession of his Grand Lodge Certificate, he can apply to become a joining member of a Lodge of his choosing.

**Note:** *It is not a requirement of Rule 173(a), Book of Constitutions that a Degree by Request can only be granted to a subscribing member of a Lodge.*

January 2021 - Deputy Grand Secretary/ Member Services





# District Grand Secretary's Handbook

## What is First Rising?

First Rising is the official newsletter for members of the United Grand Lodge of England. They are sent every three weeks to all members that have an email address on Adelphi – currently over 160,000 members. Lodge Secretaries do not need to forward it on to members for this reason.

The newsletters contain key updates and information from UGLE as well as interesting features from across the Constitution to keep members engaged in Freemasonry.

The newsletter is always sent on a Monday at 10am, but Provincial/District Grand Masters and Grand Superintendents are sent the final edition on the Friday before.

Should members wish to change their email address preferences, they are able to do so by clicking through the link in the penultimate item in the newsletter.

For each edition, we download the latest member lists from Adelphi, so it is unlikely that we miss anyone who should be receiving the newsletter. If this happens, please do get in touch with Shaun Butler and he will add them to the mailing list.



## First Rising and bUGLE

## What is bUGLE?

The bUGLE newsletter is a key form of communication between Grand Lodge and Provincial/District executive teams. This newsletter often contains confidential information and must not be distributed further than key members of the Provincial/District executive.

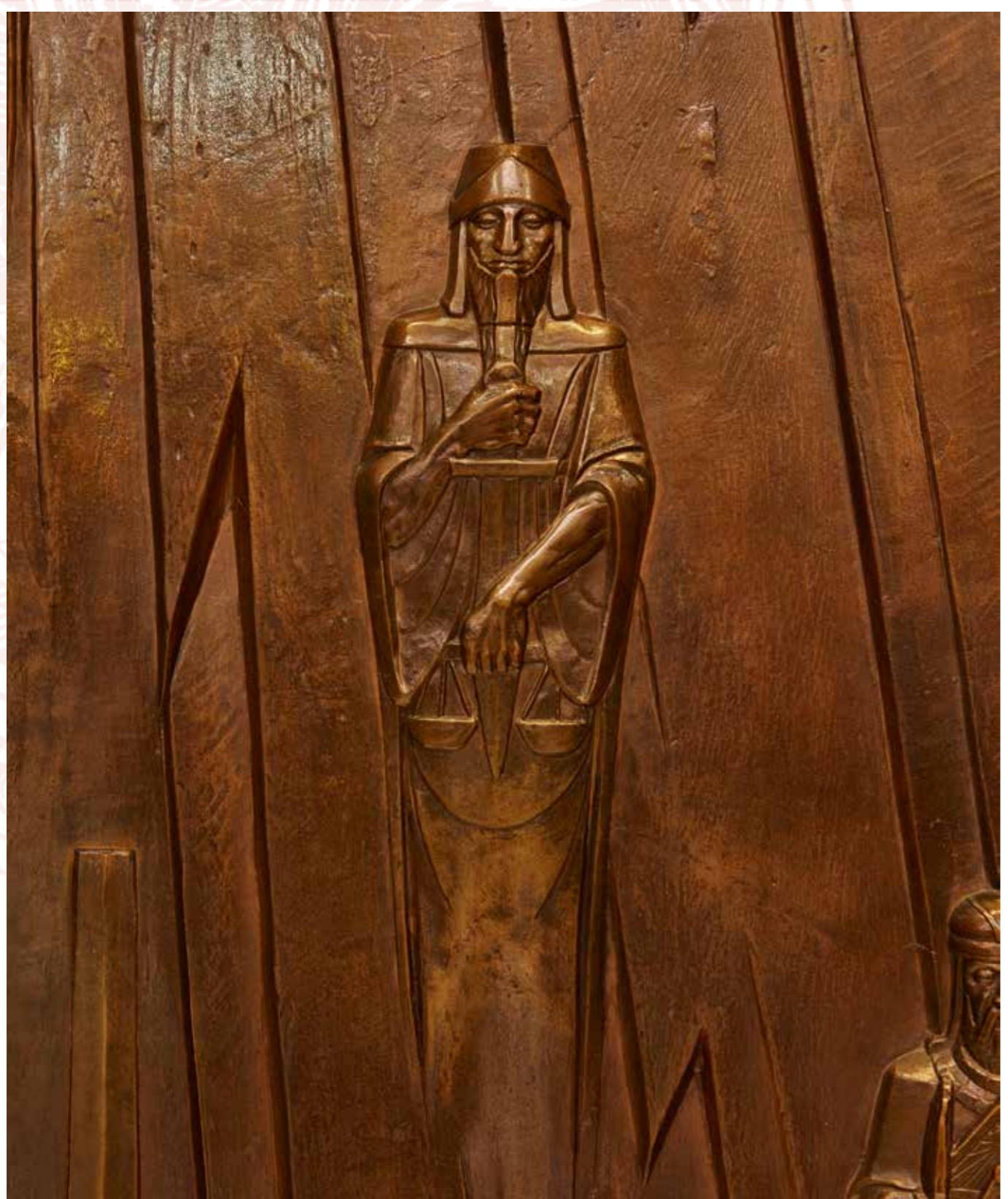
## How often is it distributed?

It is sent out whenever there is an announcement from Grand Lodge. This will usually be on a Friday.

## Past Editions needed?

If past editions are required, the Communications team at UGLE are able to provide access. For more information please contact Shaun Butler at [sbutler@ugle.org.uk](mailto:sbutler@ugle.org.uk)





### 1. Introduction

In an age of instant global communications, it may be helpful to codify how you should deal with Foreign Grand Lodge matters. Perhaps the first point to make is, that although our Districts are situated overseas and possibly sharing territory with FGLs, they are part of UGLE. Thus, when a brother is going on holiday to Jamaica, for example, he will not be going 'abroad' in masonic terms if he plans to attend an English Constitution Lodge (i.e. a Lodge administered by UGLE through its District Grand Lodge of Jamaica and the Cayman Islands).

Another point to make is that there are no English Constitution Lodges in Scotland and Northern Ireland. Whilst both are members of the United Kingdom, they both have separate Grand Lodges: Ireland (1725) and Scotland (1736) and they are both "Foreign" Grand Lodges (the Grand Lodge of Ireland having jurisdiction over the entire island of Ireland).

Masonic protocol dictates that contact from or to a Foreign Grand Lodge may only be conducted by a Grand Lodge. The very sensible reasoning behind this is that things change and what was the case at one time might not be so now. A list of Foreign Grand Lodges that are recognised as regular by us is shown on our website, so that your member will not be caught out under Rule 176.

### 2. Our members visiting Foreign Grand Lodges

a) Check that the visit is at least a fortnight away!

b) If the Brother has been invited to visit a Lodge under a Foreign Grand Lodge.

Check that the Lodge to which he has been invited is one under a Foreign Grand Lodge that is recognised by UGLE (a list of Foreign Grand Lodges is shown on the UGLE website [here](#)). If the Brother does not know the name and number of the Lodge that he is visiting, he should ask whomever has invited him, so you can send the information for verification by the UGLE External Relations team.

If the Brother has no invitation as such, but wants to visit a Lodge whilst overseas:

a) Advise him (if appropriate) of the presence of a UGLE District, Inspectorate, or NUD (Not Under a District) Lodge in the locality that the Brother is visiting (they are listed, as are the towns, where they meet in the Year Book and Directory). If UGLE has no convenient Lodges, or the Brother specifically wishes to visit a Foreign Grand Lodge, then you can check the nearest recognised Foreign Grand Lodges on the UGLE website [here](#)) and pass on the details of the Grand Secretary of that Grand Lodge.

b) You should add the proviso that no contact should be made by the visiting Brother until he is actually *in* the country being visited. Contact from home, whether that is England and Wales or in a District, Inspectorate or NUD is against Masonic protocol and the Grand Secretary abroad will usually send such direct communication to the External Relations Department.

- c) Advise the Brother that he needs to take his Grand Lodge Certificate and Clearance Certificate from his Lodge in the event it is requested.
- d) The External Relations Department is able to assist with confirming whether there is regular Freemasonry in towns outside the usual capital cities visited by Brethren. Indeed, it should be noted that not all Foreign Grand Lodges are headquartered in the capital city.
- e) It is worth noting that not all Foreign Grand Lodges have Lodges that work in English.

Please note that even though Lodge members would like you or the External Relations Department to provide a tailored itinerary ("is there a Lodge meeting on 22nd July") – this is not possible as we do not have official access to information when Lodges that meet under another Grand Lodge will be meeting.

### 3. Members of Foreign Grand Lodges visiting UGLE Lodges

- a) If the Brother has been invited to visit by one of your members:

The inviting brother will usually know that the Grand Lodge of his visitor is regular, but if he is at all unsure, then he should check those details with your office. Again, all of the Grand Lodges that we recognise are shown on the UGLE website [here](#).

As the Brother is being invited, there should be ample opportunity for him to send through images of his Masonic travel documentation to his host who can pass them to you for checking. Please note

that whilst under UGLE rules visitors will only need to have their Grand Lodge Certificate and a Letter of Good Standing/Clearance Certificate from their Lodge, official documentation varies for Foreign Grand Lodges. North American Grand Lodges use the 'dues card' system; Brazilian Grand Lodges use a Masonic 'passport' but in all cases, they clearly show the name of the Grand Lodge, the name of the individual Lodge and its number and the name of the visiting Brother and his rank.

- b) If the visiting Brother has no invitation as such, but rings up or just arrives on the day.

If he is calling you, he should be in your Province, District, etc. If he is calling from abroad, you should either ask him to get in touch via his Grand Lodge or ask him to get in contact with the External Relations Department at [chancellery@ugle.org.uk](mailto:chancellery@ugle.org.uk). Check his paperwork either by asking him to arrive at a convenient time before the Lodge meeting or by sending you an electronic image of the documentation.

If the visitor just turns up on the day (this does not happen often) and the Lodge Secretary calls you, you can either follow the steps above, or call the External Relations Department on 020 7395 9227 or 020 7395 9381. Lodge Masters/Secretaries may need to be reminded of Rule 125 (b) in the Book of Constitutions.

### 4. Ritual Demonstration by, or for, Foreign Grand Lodges

Demonstrations are when Lodges invite or are invited by a Foreign Grand Lodge to demonstrate 'their' degree work.

The demonstration may proceed, provided that the following points are observed:

- a) Only Master Masons should be present at the demonstration.
- b) No demonstration of the ritual of another Grand Lodge is to be given in a Lodge of Instruction.
- c) The Lodge hosting the demonstration must be 'called off' for the duration of the demonstration, but the Lodge room is to remain Tyled throughout.
- d) No Lodge of another Constitution may meet and confer a degree (as opposed to demonstrating a conferral) in an English Constitution Lodge.
- e) The demonstration is in English, unless a request has been submitted in writing to the Board of General Purposes and it has given its permission for it to be in another language.

If one of your Lodges has been invited by a Lodge under a Foreign Grand Lodge to demonstrate a degree ceremony, or they wish to invite another Lodge from a Foreign Grand Lodge to demonstrate a degree ceremony, they should contact your Provincial/District office with this request. Your office should then contact the External Relations team at UGLE who will write to the Grand Secretary/Grand Chancellor of the Foreign Grand Lodge to obtain approval.

### 5. 'Twinning' of Lodges

We have a number of Lodges that are 'Twinned' with Lodges from other recognised Foreign Constitutions. 'Twinning' is a relationship between two Lodges of different Constitutions that allows them to visit and correspond with each other without seeking permission from the Grand Secretaries' offices on each occasion. However, correspondence concerning Masonic policy must still be directed through the respective Grand Secretaries as, for instance, in the case of a proposed demonstration.

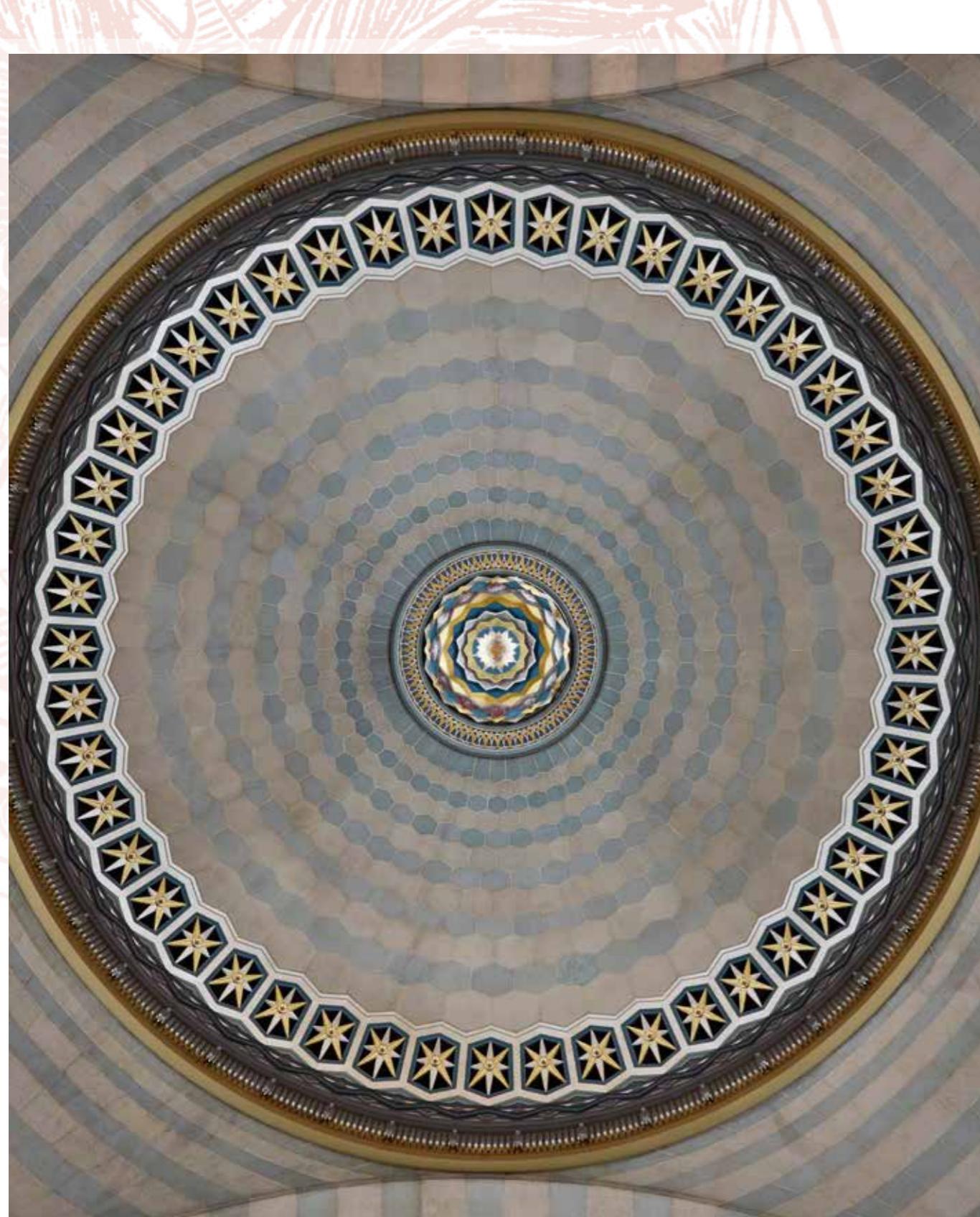
In no circumstances may a twinning relationship be used as a reason for a Foreign Constitution to meet within the jurisdiction of the United Grand Lodge of England, or for an English Lodge to meet in the jurisdiction of another Grand Lodge unless that jurisdiction is shared with one of our Districts, e.g. South Africa.

If one of your Lodges wishes to twin with another Lodge (maybe because they visit each other on a regular basis) they should first contact the External Relations team at UGLE who will write to the Grand Secretary/Grand Chancellor of the Foreign Grand Lodge to obtain approval.

January 2021

Member Services





### 1. Scope

This policy sets out UGLE's approach to the issues raised for Freemasonry by gender reassignment. It is intended to help guide Lodges in their decision making. It does not impose binding rules and although it gives some general guidance on discrimination law it does not constitute legal advice.

This Policy does not attempt to address all the issues relating to gender which may arise as gender reassignment and gender transition become more prevalent in a changing society and when they do they will need to be addressed in accordance with Masonic principles of lawfulness, kindness and tolerance.

### 2. General

It is important that any situation involving gender reassignment of a Freemason is treated with the utmost compassion and sensitivity and that the individual is supported throughout the process.

If a Freemason who is a member of UGLE wishes to change gender and become a woman we expect that the Freemason would receive the full support of their brethren. The privacy of the individual should be respected and there will normally be no requirement to inform the applicable Metropolitan, Provincial or District Grand Secretary or the Grand Secretary about this change.

### 3. Applications for admission

A candidate for admission to Freemasonry under the jurisdiction of UGLE must be a man. Should a person who has undergone gender reassignment and has become a man apply to become a Freemason then his application must be processed in the same way as for any other male candidate.

Any qualified candidate for admission may be proposed for membership of a private lodge in accordance with the provisions in the Rules contained in the Book of Constitutions. No candidate should be subjected to questions about their gender which could make them feel uncomfortable.

### 4. Continued membership

A Freemason who after initiation ceases to be a man does not cease to be a Freemason.

We expect that Freemasons will act with compassion and sensitivity towards their fellow Freemasons.

We hope that no Freemason would engage in unwanted conduct relating to another Freemason's actual or perceived gender reassignment or gender transition.

Such conduct would not only be unmasonic but is also unlawful if it has the purpose or effect of violating the dignity of, or creating an intimidating, hostile, degrading, humiliating or offensive environment for, the victim.



## 5. Resignation from the Craft

A Freemason who becomes a woman is not required to resign from the Craft. If a person resigns from the Craft then they and their dependants might no longer be eligible for some of the benefits provided by the Masonic charities now or in the future.

## 6. Exclusion from a Lodge

A Lodge may vote to exclude any member for sufficient cause. The following grounds would constitute unlawful discrimination and so could never constitute sufficient cause:

- a) The fact that a member has legally become a woman;
- b) A mistaken belief that a member has legally become a woman;
- c) The fact that a member is in the process of transition from male to female; or
- d) A mistaken belief that a member is in the process of transitioning from male to female.

Similarly a Lodge must not attempt to persuade a member to resign from the Lodge or discriminate against a member based on any of these grounds. A Lodge must not at any time require a member to prove that they are legally a man.

## 7. Amendment

The law and what is considered best practice in this area are developing rapidly. This policy may be amended from time to time and so please ensure that you are referring to the latest version.

**Date adopted: 17 July 2018**

## Gender Reassignment FAQs – Lodges

These FAQs are intended to provide some practical guidance to Lodges about how to comply with the law and how to implement UGLE's gender reassignment policy.

Freemasons are expected to act with sympathy, compassion and courtesy to other people and this guidance should be read in that light.

### **One of our members is living as a woman – what should we do?**

Nothing.

### **One of our members has become a woman – what should we do?**

Nothing.

### **One of our members has declared that they are not a man but are gender neutral – what should we do?**

Nothing.

### **One of our members has started wearing a skirt – what should we do?**

Lodges must where applicable permit appropriate female alternatives to their dress code. A dress code which requires a dark suit will for example accommodate a smart dark skirt and top.

### **One of our members has asked to be called "Mrs Smith", "Sister Smith" and "Jane" in correspondence and conversation.**

As a matter of courtesy, a person should be addressed by the name and title he/she has chosen (except for titles which are restricted such as "Sir" or "Lord").

The only correct way to refer formally to a member in Lodge is as "Brother Smith" or "Brother Jane" regardless of gender.

### **Some members are unhappy that a member of the Lodge has become a woman. Can I have a quiet word with her, suggesting that she might wish to consider her position?**

No. She should not be subjected to any pressure or suggestion, or perceived pressure or suggestion, that she should resign from the Lodge because of her change of gender.

It would be appropriate to have a quiet word with the unhappy members to remind them of their Masonic obligations.

If she asks questions about joining a female Freemasonry organisation then ask your Metropolitan, Provincial or District Grand Secretary for contact details for female Freemasonry organisations so that you can pass the details on to her.



**Our Lodge wishes to exclude a female member. Are there any specific considerations that arise?**

Rule 181 permits a Lodge to exclude any member for sufficient cause. Female members can be excluded for all of the same reasons, but only the same reasons, as male members. In this context an allegation of disharmony or potential disharmony on the grounds of a member's gender, perceived gender, gender reassignment status or perceived gender reassignment status is not sufficient cause for exclusion.

As always when applying Rule 181, all of the requirements of the procedure set out in the Rule must be followed and great care should be taken when drafting the particulars of complaint so that it is clear what the grounds for exclusion are.

**A member of our Lodge is no longer male and wishes to resign from the Craft.**

No member should be pressured to resign from the Craft because they are no longer male.

Any member who resigns from their Lodge will remain a member of the Craft and will remain eligible for some of the reliefs currently offered by Masonic charities. A member who resigns from the Craft as well as all their Lodges may lose eligibility for some of those charitable reliefs. Members who are considering resignation from the Craft should be advised to have regard to the potential loss of charitable reliefs before resigning.

**One of our members has obtained a gender recognition certificate – do we need to record this or notify anybody?**

No, a certificate is a private document and nobody should request sight of it. We do not record members' genders and there is no need to notify anybody if a member changes their gender.

**One of our members has complained about comments made by other members relating to his/her gender, perceived gender or gender reassignment. The comments were part of the normal jokes of members and were not unusual or objectively offensive.**

If the comments had a sufficient impact on your member that they felt the need to complain then the situation should be taken seriously. This is the case even if the comments seemed innocuous to you and others. It is important to keep in mind that harassment may lie in the complainant's perception.

Lodges must not victimise a member for bringing discrimination claims or complaints against the Lodge or its members. That member must be treated in the same way as a member who had not brought the claims or complaints. Nobody should be penalised merely for making an unsuccessful discrimination claim or complaint unless it was clearly vexatious or malicious.

The members who made the comments should receive an explanation that their comments caused offence, however inadvertently, so that they know to avoid comments of that nature at future Lodge events. If a member who has received an explanation repeats his behaviour this is likely to be unmasonic behaviour which is subject to the usual sanctions.

**One of our members has indicated that he will blackball a male candidate because the candidate lives as a woman/ wears female clothing/ is perceived by that member to be female/ has stated that he will transition to become a woman.**

These are not legitimate reasons for blackballing and would constitute unmasonic behaviour which is subject to the usual sanctions.

**A member proposes to bring a female visitor to the Lodge meeting – what should we do?**

A visitor must be a member in good standing of this or another recognised Grand Lodge. Rules 125 and 126 govern who may be admitted as a visitor and the by-laws of the Lodge may contain additional requirements. The Master of the Lodge may refuse admission in accordance with Rule 126 if the visitor is of known bad character.

He may also refuse admission if he has reasons to rule that the visitor's presence would disturb the harmony of the Lodge. He may not refuse admission if his reasons for believing that the harmony of the Lodge would be disturbed are related to the visitor's gender, perceived gender, gender assignment or perceived gender assignment.

**My question is not answered here.**

There will plainly be other questions which arise when applying the gender assignment policy. If your question is not answered in the latest version of the FAQs on this issue then please contact your Metropolitan, Provincial or District Grand Secretary.

*These FAQs are intended to help share knowledge and guidance but are not legal advice and are not a substitute for independent legal advice on compliance, if you consider that necessary. Lodges which are not based in the UK will need to consider the impact of any local laws concerning gender and gender reassignment.*

January 2021

Legal Services





# District Grand Secretary's Handbook

Immediately after a Brother has been raised to the Third Degree the Lodge Secretary should complete an application form for the issue of a Grand Lodge Certificate (Form LP&A5) supplying the Brother's full name and the dates of initiation, passing and raising. The information supplied should be carefully checked against the Lodge records before being submitted.

The completed form should then be forwarded to the District Office, by post or by email to be processed.

On presentation of the Certificate to the Brother, he should be asked to confirm that his details are correct and sign his name in the designated space on the right hand margin. The fact of the presentation must be entered into the Lodge minutes.

January 2021

Member Services



## Grand Lodge Certificates issued to Master Masons

### United Grand Lodge of England

#### FORM OF APPLICATION FOR GRAND LODGE CERTIFICATES

LP&A5

Received via e-mail

from the

Lodge No.

meeting at

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

This form must be used only for Brethren whose names have already been registered and registration fees paid, and should be used immediately after the Brethren concerned have been raised and have received the Traditional History, following which only is the ceremony of raising complete.

If you do not receive a Certificate within 28 days of submitting this form, please e-mail: [registration@ugle.org.uk](mailto:registration@ugle.org.uk)

Surname (BLOCK LETTERS)	Christian or Forenames in Full	Date of Initiation	Date of Passing	Date of Raising

Can be altered to  
provincial email if  
required

Please ensure that the details supplied above have been checked against the Lodge records before being submitted

Remarks

Secretary's details

e-mail address

Name of Secretary (BLOCK LETTERS)

N.B.: Please state if there  
is any alteration in  
Name and/or address of  
Secretary

Address

Postcode

Date

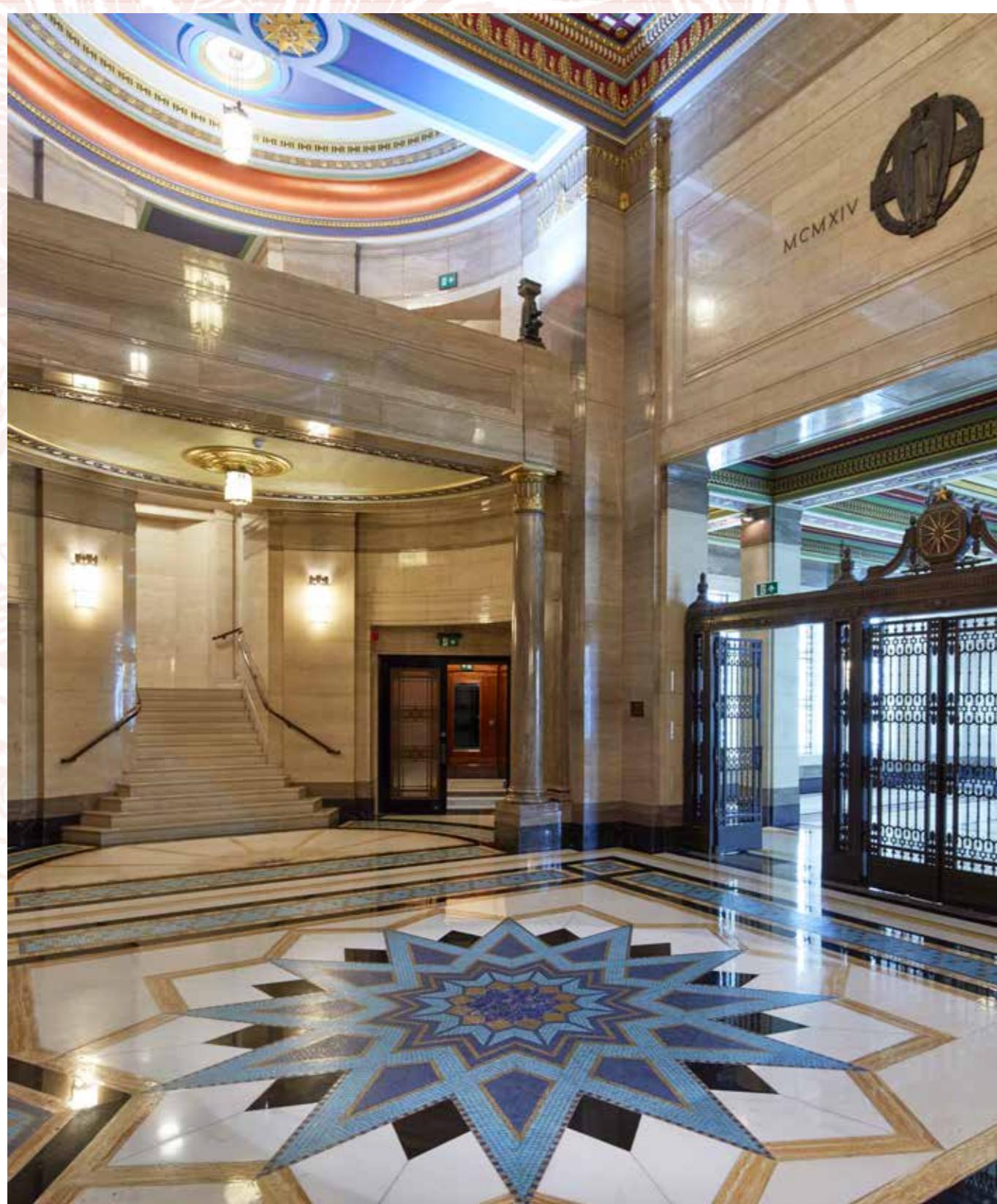
When completed, please send as an e-mail attachment to your Provincial Office, if so directed, or to: [registration@ugle.org.uk](mailto:registration@ugle.org.uk)

Lodge No.

DISTRICT

This space is for the use of the Grand Secretary's Office	Certificates	Date of Issue	Entered by





Project Hermes will be a system that both you and your members will want to use. It will be a modern and simple web-based system, transforming the way in which forms are completed – moving away from an endless form-filling process to drastically reduce turnaround times.

You are encouraged to share this update on Hermes with your Lodge Secretaries so that they are aware of the changes that are being planned. Further updates will be communicated throughout the process.

### What is Project Hermes?

- Hermes is the redesign and implementation of changes to our internal organisational processes to make life easier for our Lodge and Chapter Secretaries, Provincial and District teams and UGLE.
- Integral to this redesign are functions aimed at giving Provincial and District Executives the tools to help them in the engagement of their membership. This includes removing the need to fill in paper forms, streamlining the process to collect dues payable to UGLE and the Province/ District and enhancing the ability to analyse and spot trends in members' data.
- Hermes will be easy to use, intuitive and provide the functionality to assist all users in their roles.
- Hermes will be rolled out in a controlled manner following extensive user acceptance testing - the rollout will be phased with the solution being made available to pilot regions first, then a planned rollout to other Provinces and Districts.



## Pilot Regions

- Six Pilot Regions are assisting – recommended by the Project Steering Group;
  1. London (Metropolitan)
  2. Hampshire & Isle of Wight
  3. Cheshire
  4. Bristol
  5. Cyprus
  6. Eastern Archipelago
- The purpose of the Pilot Regions is to provide input on current processes (noting regional variations) and to the new 'To-Be' processes. Further down the delivery timeline, they will be reviewing training material, undertaking user acceptance testing and working with the Project Team to ensure that users are fully supported through the transition to the new system.
- Several workshops have already been held with the pilot regions which were very informative and received positive feedback on the progress to date.
- All PGMs/DGMs/GSupts and Provincial and District GSecs/GSEs are regularly updated by David Staples (via the bUGLE bulletin) and have the opportunity to comment on the various elements throughout the project.

## Functionality

- This is divided into four categories; Membership, Journey, Finance and Analytical (Craft & Royal Arch)
- Defined in seven processes that all Lodge Secs / Chapter Scribes E carry out in paper form
  1. Candidates – Registration Form M/P/A
  2. Joiners – Registration Form M/P/A
  3. Grand Lodge Certificate – LP&A5
  4. Installation Returns – LP&A4
  5. Annual Returns
  6. Dispensations
  7. Change of Membership Status

## How it works

- The primary users of Hermes will be Lodge Secretaries and Chapter Scribes E, who will be provided with a unique login to access the Hermes online portal. Based on our analysis to date, we are anticipating that other Lodge/Chapter Officers may also require access.
- Accessing the Hermes platform will enable users to view and update current members' data held on the ADelphi database, submit new Candidate and Joiner registrations, file their Annual and Installation Returns and apply for the more common dispensations online. Where possible, all data will be pre-populated, therefore removing the duplication of effort often experienced with the manual, time-consuming paper based processes.
- One of the key features of the new system, will be to provide Lodges and Chapters access to a simple to use online payment facility, integrated with Hermes, which will enable faster, secure payments throughout the organisation.

## IT capability

- The Lodge Secretaries & Chapter Scribes E will be expected to have access to a computer with internet connectivity and have use of a personal email address.
- If you are using an internet banking site or regularly shop online, then your current IT skills will meet the prerequisite skills to use Hermes.
- Prior to launch, extensive training material will be developed and made available in various formats, to ensure that users are both competent and confident using Hermes from the outset.

## Contact details

If you'd like to know more about Project Hermes, please contact Tony Keating (Project Manager) and Nigel Codron (Business Analyst) at [hermes@ugle.org.uk](mailto:hermes@ugle.org.uk)





## District Grand Secretary's Handbook



Page 88 – Installation Return

## Installation Return (Form LP&A4)

Every Lodge, by its Secretary, shall annually, immediately after the installation of the Master make a return to the Grand Secretary of the Master, Wardens, and Past Masters of the Lodge and of all members who claim to be entitled to attend the Grand Lodge as Past Masters, under Rule 9, having served the office of Master in some other Lodges, specifying the Lodge in which each of them has serviced the office of Master, and no Brother shall be permitted to attend Grand Lodge unless his name shall appear on such return. This return shall also contain the full names and addresses of the Master, Secretary, Almoner and Charity Steward. The Master and Secretary shall sign the return.



©Museum of Freemasonry, London

Page 89 – Installation Return





*"As a citizen every Freemason has a duty not to engage in conduct which is contrary to the law of the land. As a Freemason he also has a duty not to engage in activity which may bring Freemasonry into disrepute"*

(Rule 179, Book of Constitutions)

If a Brother breaches either of these duties then disciplinary action may be required. It is also possible, though rarer, for a Lodge to be subjected to disciplinary action. The disciplinary process is governed by the Book of Constitutions and by the booklet *Masonic Conduct – Guide to Investigations*. If you have any questions about the process that are not answered there then contact Matt Gawn at UGLE. All disciplinary papers which are required to be sent to the Grand Secretary should be sent marked for the attention of Matt Gawn.

## Identification

The starting point is to identify the nature of each case and determine what, if any, action should be taken. This will depend on:

- The severity of the offence
- The reliability and validity of evidence produced to substantiate the complaint made
- Whether the offence is subject to a Police investigation or judicial process
- Whether the Brother in question has previously been convicted of an offence
- Whether the Brother in question is or has previously received a custodial sentence

Should there be any criminal justice or other legal process which has yet to be concluded, invariably the Masonic Authority should not begin disciplinary action until such legal process has ended. To act hastily may prove embarrassing should the Brother in question be found innocent.



## Notification

The Masonic Authority may choose to convene a preliminary committee to investigate the facts (if the matter is complex) or go straight to appointing a Committee of Inquiry.

The booklet *Masonic Conduct - Guide to Investigations* sets out the requirements for Committees of Inquiry, and in particular:

- Paragraph 0303 details the considerations when settling the composition of the Committee to ensure no valid accusation of bias can be raised
- Paragraph 0405 details the steps and timescales which must be followed to ensure the Brother in question has been notified correctly of the process

Upon conclusion of the Disciplinary Hearing, a full report containing the Committee's findings and recommendations should be prepared by the District Grand Secretary and presented to the Masonic Authority. If the offence is the subject of a criminal conviction, this should be stated. Similarly in the case of a breach of a specific Rule in the Book of Constitutions. Only if there is no criminal conviction of a Rule involved should it be described as 'activity which may bring Freemasonry into disrepute'.

The Masonic Authority must then use the report to reach his own decision on the matter. He is not bound by the recommendation of the Committee but is well advised to record his reasoning if he departs from the recommendation. The decision and all related papers must be sent in writing to the Grand Secretary – please note, all papers should be single sided and bound only with paper or bulldog clips.

## Penalties

If the case is serious enough to warrant a penalty the options are:

- Admonition – this must be reported formally to Grand Lodge unless the Masonic Authority considers the case of insufficient importance
- Suspension – the suspension and the commencement date (even if back-dated) must be clear
- Recommendation for Expulsion
- Recommendation for an Invitation to resign – under Rule 277A, Book of Constitutions, the Masonic Authority may decide that the Brother in question should be invited to resign from Freemasonry and this must come from the Grand Secretary. This is tantamount to expulsion.

It is further important to note that in cases of Admonition or Suspension, the Brother in question should be reminded of his right to appeal against the decision of the Masonic Authority under Rule 185, Book of Constitutions. An appeal must be made within three months of the decision.

In cases where there is a recommendation for Expulsion, the Brother in question should not be reminded of his right to appeal under Rule 185 as under Rule 277 his case is automatically placed before an Appeals Court.

## Appeals Court

The Appeals Court is an independent Masonic body, which determines cases where members have been recommended for expulsion (under Rule 277, BOC) or appeals against suspension or admonition (under Rule 185, BOC).

All Brethren recommended for expulsion and all appellants have the right to be present at an Appeals Court hearing, and to be represented or accompanied by a fellow Mason (a non-Mason may be permitted by leave of the President of the Appeals Court).

The Masonic Authority appealed against is entitled to attend and make representations (either himself or by another on his behalf) in an appeal under Rule 185, BOC. He is entitled only to make written representations in the case of a recommendation for expulsion (Rule 277, BOC).

## Panel for Clemency

The Panel for Clemency is chaired either by the Assistant Grand Master, or the Deputy Grand Master in his stead.

The Panel for Clemency is comprised of three Provincial Grand Masters and three ordinary members, drawn in each case from a list of eight appointed annually.

The Panel for Clemency normally takes place on the afternoon of a Quarterly Communication, and is an opportunity for Brethren to state their case as to why an expulsion upheld or imposed by an Appeals Court should be reduced to a lesser penalty. Brethren have 30 days (if resident in London or a Province) from notification of the decision of the Appeals Court (90 days if resident anywhere else) to enter a plea.

The Panel for Clemency is not a means by which cases may be re-heard, and the finding by the Appeals Court that an offence has been committed is final. The Masonic Authority is not entitled to attend the Panel's hearing.

## Key Points

The three fundamental points in any Disciplinary case are:

- Consult the 'Red Book' (*Masonic Conduct Guide to Investigations*)
- Consult the Book of Constitutions
- Consult [Simon Mighall](#), [Matt Gawn](#) or the Deputy Grand Secretary if uncertain on any matters.

January 2021

Disciplinary





### What is the Members Pathway?

One of UGLE's strategic objectives, and a major priority for all Districts, is to improve the attraction and retention of members. There are many steps a District can take to assist with membership development. Unless our Lodges are attractive and have good membership processes, they will not succeed in retaining the long-term members that are necessary for the health and sustainability of the Craft.

The Members Pathway has been designed especially for use by Lodges offering the tools and techniques on the Attraction, Development, Retention and Retrieval of members.

The areas covered in the Members' Pathway start with a review to ensure the Lodge is relevant and attractive to new members and continues with methods of identifying potential members and approaching them, responding to those who enquire about Freemasonry, screening potential candidates to ensure they are suited to the Lodge, the interview process, introducing new members, the mentoring process, introducing the Royal Arch, retaining members and retrieving them if they are dissatisfied. The first six areas are usually co-ordinated by a Lodge Membership Officer, the next four by the Lodge Mentor and the final Step by the District.

Districts have a key role in promoting the Members' Pathway, in helping Lodges to follow the guidance and use the techniques it offers and in supporting those brethren who have particular roles in Lodges. Those Districts that have put resources behind the Members' Pathway are now seeing the benefits with increased candidates and improved retention.

For more information about the Members Pathway please visit <https://b.ugle.org.uk>





The following points, some of which are not specifically mentioned in the Book of Constitutions, may help.

### Petition

1. An application for a Warrant for a new Lodge is made on a **printed form which must be obtained by you from the Grand Secretary's office**.
2. All petitioners for new Lodges to meet in London or a Province must be;
  - a) Members of the English Constitution;
  - b) Master Masons of at least three years' standing
3. For new Lodges to meet overseas;
  - a) All petitioners must be Master Masons of at least three years' standing;
  - b) Not less than four-sevenths must be members of the English Constitution;
  - c) The remainder must be regularly registered under the Constitution of a Grand Lodge recognised by the United Grand Lodge of England.
4. In **very** special circumstances permission is sometimes given for a Brother to sign the petition who will not complete three years as a Master Mason until just before the expected date of Consecration. Written application to include his name should be made in such a case stating the special reason.
5. The petitioner nominated for appointment as first Master of the Lodge must be an Installed Master of the English Constitution. The first SW and JW would normally also be similarly qualified.



## Certificate of Good Standing

6. The petition must specify every Lodge to which each petitioner belongs or has at any time belonged, and in respect of each a Clearance Certificate framed in accordance with Rule 175 must be submitted to you.
7. Clearance Certificates need not be sent to Grand Lodge but your covering letter enclosing the petition should state that they have been inspected by you and that they are in order.
8. A Clearance Certificate in respect of a Lodge of which a petitioner is no longer a member must;
  - a) Be dated to cover him to the date of his resignation, or
  - b) If he ceased membership for non-payment of dues, but has subsequently paid his arrears, state that this is the case.
9. Where a Brother is still a subscribing member of a Lodge it is expected that the Clearance Certificate will be dated as near as possible to the date when the petition is likely to be recommended by the sponsoring Lodge, and in any case, not earlier than the close of the last financial year of the Lodge issuing Certificate.

## Unattached Masons

10. 'Unattached' Brethren may sign a petition if they produce Clearance Certificate(s) as above.

## Submission of the Petition

11. Only seven names may appear on the Warrant including the Master and Wardens designate. The four other names should be clearly marked with an asterisk.
12. It is particularly important that each petitioner prints his name in full next to his signature on the petition and enters his masonic details in the appropriate columns. In the case of the seven to appear on the Warrant, any styles, titles or honorifics that they wish to be included must be clearly shown.
13. When the petition has been signed by all the petitioners and recommended by the sponsoring Lodge and by the Provincial or District Grand Master, or the Grand Inspector, it should be sent to the Grand Secretary for submission to the MW The Grand Master, together with a letter from the proposed first Master or the acting Secretary to the petitioners, setting forth the reasons for the proposed Lodge and the name selected.
14. The life of a new Lodge starts at its Consecration and any signatory to the petition who withdraws his name before then cannot be considered a Founder. If he withdraws after the petition has been sent to the Grand Secretary please inform Masonic Services without delay so that his name may be deleted from the petition. It is **essential** that Masonic Services be informed as soon as possible should any change become necessary in the names of those nominated for the office of First Master, Senior or Junior Warden.

15. In special circumstances where, through illness or absence abroad, a Brother has been unable to sign the petition before it was sent to the Grand Secretary, permission may sometimes be given for him to sign a further sheet at the District Grand Secretary's office, or the original at the Grand Secretary's office, before the date of Consecration. If it is desired that such a concession should be made, permission is to be sought from the Grand Secretary in writing.

16. The information regarding the possibility of signing petitions after they have been sent to the Grand Secretary should not be made generally known as it is all too capable of being abused. It is included in this letter only as a policy guide if any such requests are made to you.

**In no circumstances can names be deleted from, or added to, a petition after the Consecration has taken place.**

17. The receipt of a petition here is no guarantee that it will be granted and to avoid any disappointment or possible financial loss by the petitioners, it is wise to advise them not to make arrangements for the consecration or equipment until formal notice of the granting of a Warrant is received.

## Warrant of Constitution

18. The Grand Secretary's office will start to prepare a Warrant as soon as the petition has been granted. If you have not received it in good time for the Consecration, you should inform the Grand Secretary and a typescript copy will be sent to you for use at the ceremony. This should be returned when the Warrant of Constitution is received.

January 2021

Masonic Services





Grand Lodge has never published a list of organisations that are compatible or incompatible with membership of the Craft. There are so many of them and some of them are born and die so quickly that we could never be sure that at any particular time the list was comprehensive.

For your own information, you may find the following helpful:

### Group A - Organisations Incompatible with Membership of the Craft

1. Any organisation where men and women sit together in Lodges purporting to be Masonic, including:
  - a) Order of the Eastern Star
  - b) International Order of CO-Masonry
2. Other organisations falling in GROUP A are:
  - a) Ancient Mystical Order Rosae Crucis (not to be confused with the Societas Rosicruciana in Anglia in GROUP B)
  - b) Atheneum Grand Lodge
  - c) Association des Juristes European Macons
  - d) Groupement Interprofessionel du Tourisme European ('GITE')
  - e) Hiram Grand Lodge
  - f) Independent United Order of Mechanics
  - g) Job's Daughters (associated junior organisation of the Eastern Star)
  - h) King Solomon Grand Lodge
  - i) Order of De Molay for Boys (equivalent of Job's Daughters and Order of Rainbow for Girls)
  - j) Order of Rainbow for Girls (associated junior organisation of the Eastern Star)
  - k) Royal Knights of Justice
  - l) Universal League of Freemasons ('LIGA')

### Group B – Organisations Compatible with Membership of the Craft

1. Buffaloes, Royal Antidiluvian Order of N'nai Brith
2. Druids
3. Fellowship of the Services
4. Foresters
5. High Twelve Club
6. Lion Club
7. National Sojourners
8. Oddfellows
9. Orangemen
10. Rechabites
11. Rotary
12. Round Table
13. The Most Venerable Order of the Hospital of St John of Jerusalem
14. Societas Rosicruciana in Anglia
15. Sons of England
16. Loyal Order of Moose

Should any order or society come to notice that is not on this list please refer for advice to the Grand Secretary's office via the Director of Masonic Services.

January 2021  
Masonic Services





## Registration Form Guidelines for completion

The following pages explain the sections of the UGLE Registration Form DGL that must be completed by:

- All candidates for initiation in a Lodge
- All joining and/or re-joining members
- The Proposer and Seconder
- The Master
- The Secretary

All these sections must be completed. If there are any omissions the Registration Form will be rejected and returned for completion and re-submission.

The names of those Brethren in respect of whom Registration Forms have not been properly completed will not appear on any Annual Returns until such time as their names can be added to the UGLE database. The Lodge will, however, still be liable for the Annual Dues payable.

**The fully completed Registration Form must be submitted immediately following the Initiation or the joining of a member to avoid delay in him being registered as a member.**



# United Grand Lodge of England

## Registration Form A

FORM PROVIDED UNDER RULES 159, 160, 163 AND 164, BOOK OF CONSTITUTIONS

D.G.L.

Application for admission to membership of \_\_\_\_\_ Lodge No. \_\_\_\_\_

Meeting at \_\_\_\_\_ District of \_\_\_\_\_

This form (when completed by the Candidate and his Proposer and Seconder) is to be handed to the Secretary of the Lodge previous to the Meeting at which the proposition is made, on which occasion sufficient particulars of the Candidate are to be stated in order that those present may be enabled to identify him. Subsequently it must be forwarded, with the Certificates of the Master and the Secretary duly signed, to your District Grand Secretary, if applicable, together with the current registration fee, for onward transmission to the Grand Secretary.

In accordance with the requirements of Rule 163, Book of Constitutions, a Joining member must produce, for inspection by the Secretary, his Grand Lodge certificate and clearance certificates from all the Lodges of which he is or has been a member. In the case of a Joining member from another Constitution, the enquiry under Rule 163(e) must be made before the ballot is taken.

**A** To be filled up by the Candidate, in his own handwriting unless prevented by physical disability (IN BLOCK LETTERS)

THIS SECTION MUST BE COMPLETED BY THE CANDIDATE HIMSELF

Surname \_\_\_\_\_

ABBREVIATED FORENAMES SUCH AS 'TOMMY' 'MICKEY' ETC SHOULD BE QUERIED WITH THE CANDIDATE TO ESTABLISH IF THAT IS HIS FULL AND CORRECT NAME AND NOT AN ABBREVIATION

Forenames in Full \_\_\_\_\_

Home Address  
A FULL ADDRESS NOT P.O. BOX NUMBER SHOULD BE GIVEN

IF A CANDIDATE FOR INITIATION DOES NOT HAVE A HOME OR BUSINESS ADDRESS WITHIN THE LOCALITY OF THE LODGE TO WHICH HE SEEKS ADMISSION, AN ENQUIRY UNDER RULE 158 MUST BE MADE. FOR DETAILS OF LOCALITY PLEASE SEEK ADVICE FROM YOUR DISTRICT OFFICE

Postcode \_\_\_\_\_

Telephone No. \_\_\_\_\_

e-mail address \_\_\_\_\_

Profession/Occupation/Trade/Rank (PLEASE STATE) \_\_\_\_\_

TERMS SUCH AS COMPANY DIRECTOR OR CIVIL SERVANT ARE NOT SUFFICIENTLY DESCRIPTIVE

A PRECISE DEFINITION OF OCCUPATION OR FORMER OCCUPATION IF RETIRED IS ESSENTIAL

IF RETIRED, PREVIOUS OCCUPATION MUST BE PROVIDED

Employer \_\_\_\_\_

Business Address \_\_\_\_\_

Date of Birth (DD/MM/YY) \_\_\_\_\_

To be filled up by Candidates for JOINING and RE-JOINING only

NOT FOR COMPLETION BY INITIATES

Give the names and numbers of all Lodges of which you are, and at any time have been, a member, the year of your admission, and the rank you held therein. If joining from another Grand Lodge, its name, number and Constitution must be clearly stated.

Name and Number of Lodge	Constitution (if not UGLE)	Rank	Date of Admission	If P.M. Year of Mastership
ALL LODGES MUST BE DISCLOSED AND CLEARANCE CERTIFICATES INSPECTED FROM ALL THE LODGES OF WHICH THE CANDIDATE IS, OR WAS, A MEMBER				
IF THE CANDIDATE STATES HIS RANK IS AN ENTERED APPRENTICE OR FELLOWCRAFT AND A FIRST OR SECOND DEGREE CERTIFICATE IS NOT INCLUDED, PLEASE CONTACT YOUR DISTRICT OFFICE FOR ADVICE				
IF THE CANDIDATE HAS PREVIOUSLY BEEN EXCLUDED UNDER RULE 148 OR 181, BOOK OF CONSTITUTIONS, A COPY OF THE RELEVANT UP TO DATE CLEARANCE CERTIFICATE MUST BE INCLUDED				

**Data Protection**

**Mandatory consent:** I have received and read a copy of the Blue Form and I hereby consent to the processing of my personal data for the purposes set out in it.

**Optional charities consent:** I am willing for my personal data to be shared with Masonic charities so that they can process it (please tick as applicable):

on receipt of an application for relief, to determine whether I or my relatives are eligible beneficiaries  
 CANDIDATE TO TICK APPLICABLE BOXES  
 to enable Masonic charities to contact me with fundraising materials

For office use only

**TO BE SIGNED BY ALL CANDIDATES**

CANDIDATE MUST SIGN AND DATE BEFORE BEING PROPOSED AND SECONDED. IF HE DOES NOT, THE APPLICATION CANNOT PROCEED

Signature \_\_\_\_\_

Date (DD/MM/YY) \_\_\_\_\_

To be filled up by Candidates for INITIATION only, except for paragraph 5 which shall be subscribed to also by Candidates for JOINING or RE-JOINING who are unattached in accordance with Rule 127, Book of Constitutions.

Have you ever been proposed for membership in any Lodge, or has your admission to any Lodge ever been sought either by yourself or by anyone on your behalf ? YES / NO

Give the name and number of any or every such Lodge:

IF THE CANDIDATE ANSWERS YES, FURTHER ENQUIRIES AS TO WHY THE PREVIOUS APPLICATION DID NOT PROCEED SHOULD BE MADE

I wish to become a Candidate for initiation in and membership of the Lodge first named overleaf and I declare that:-

1. My application is entirely voluntary.
2. I understand that my duties as a Freemason would include an overriding duty to obey the laws of any country to which I may be subject.
3. I do not expect, anticipate or seek any preferment or financial benefit as a consequence of my being a member of the Craft.
4. I understand that I may freely declare my membership of the Order on any occasion when I can be seen not thereby to be pursuing any business, professional or personal advantage.
5. a. I have never been convicted by a Court of any offence  
 b. I have never been the subject of a finding of dishonest or disgraceful conduct  
 c. I have never been disciplined by any professional, trade or other tribunal  
 d. I am not awaiting the outcome of proceedings against me before a other tribunal  
 e. I am not, to the best of my knowledge, the subject of any criminal, professional, trade or other investigation.
6. I am not and have not been in any way connected with any organisation which is quasi-Masonic, imitative of Masonry, or regarded by the Grand Lodge as irregular or as incompatible with the Craft.
7. I undertake that if any paragraph in this declaration should become untrue or misleading at any time before I am made a Mason, I will inform my proposer and seconder without delay, and agree that by presenting myself at the meeting at which I am to be made a Mason I shall represent that this declaration remains true.

† IF THE CANDIDATE CANNOT MAKE THIS DECLARATION WITHOUT QUALIFICATION, OR IN ANY DOUBT AS TO THE SCOPE OF THIS PARAGRAPH HE MUST CONSULT HIS PROPOSER AND SECONDER BEFORE SIGNING THIS FORM OR OTHERWISE CONTINUING WITH HIS APPLICATION. PARAGRAPH 5 MUST BE AMENDED BY DELETING ANY SUB-PARAGRAPH TO WHICH THE CANDIDATE CANNOT SUBSCRIBE. FULL DETAILS OF ANY CONVICTIONS OR ANY SUCH PROCEEDINGS MUST BE DISCLOSED TO HIS PROPOSER, SECONDER AND SECRETARY OF THE LODGE. THE CERTIFICATE OF THE GRAND SECRETARY CONFIRMING THAT THE MATTERS DISCLOSED DO NOT CONSTITUTE A BAR TO INITIATION MUST THEN BE OBTAINED BEFORE THE CANDIDATE MAY BE PROPOSED IN OPEN LODGE. IF AT ANY TIME BEFORE INITIATION THIS DECLARATION BECOMES UNTRUE OR MISLEADING, A FURTHER CERTIFICATE MUST BE OBTAINED.

‡ MEMBERSHIP OF A RECOGNISED REGISTERED FRIENDLY SOCIETY DOES NOT COME WITHIN THIS CATEGORY.

**DATA PROTECTION CONSENT:**

I, the undersigned, hereby consent to the processing of personal data and information supplied in relation to Question 5 above, by the Lodge, the District Grand Lodge, and the United Grand Lodge of England.

Note: Any such data and information supplied will not be divulged to any other organisation, Masonic or non-Masonic.

TO BE SIGNED BY ALL INITIATES AND UNATTACHED BRETHREN IN CONJUNCTION WITH QUESTION 5

Signature \_\_\_\_\_

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 200 \_\_\_\_\_

QUESTIONS TO BE ANSWERED BY THE PROPOSER AND SECONDER  
OF A CANDIDATE FOR INITIATION

TO BE COMPLETED BY PROPOSER AND SECONDER IN RESPECT OF INITIATES

Proposer

Seconder

- How long have you known the Candidate?
- To the best of your knowledge and belief, are his answers to question 5 on the Registration Form true?
- Do you meet him often?
- Where do you meet him?
  - In your home?
  - In his home?
  - At work?
  - Socially?
  - Elsewhere (give details)?
- Would you welcome him into your home?
- Do you vouch for him in every respect as a suitable and desirable person for admission to the Craft?
- (a) Would his home or business circumstances make it difficult for him to attend regularly at Lodge meetings?
- (b) Do you accept the responsibility of encouraging him to make his membership effective?
- Have you informed him of:
  - his financial obligations to the Lodge and
  - the calls that may be made on his time?
- What reason have you for thinking Freemasonry will interest him?

IF A SHORT PERIOD OF TIME KNOWN HAS BEEN GIVEN,  
PLEASE PROVIDE YOUR DISTRICT OFFICE WITH FURTHER  
DETAILS PRIOR TO THE APPLICATION PROCEEDING


IF THE ANSWER TO QUESTION 5 IS "NO",  
FURTHER DETAILS SHOULD BE GIVEN AS TO WHY

Proposer \_\_\_\_\_

Seconder \_\_\_\_\_

**B Certificates of Proposer, Seconder, Master and Secretary (and of the Grand Secretary where applicable)**

MUST BE COMPLETED FOR INITIATES AND JOINERS

I, the Proposer, declare as follows:-

The Candidate has been personally known to me for  
\_\_\_\_\_ years \_\_\_\_\_ months.

To the best of my knowledge, information and belief the statements made by the Candidate on this application form are true and correct: he is a man of good reputation and well fitted to become a member of this Lodge.

[For candidates for Initiation only] The answers given by me to the questions above are true.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 200 \_\_\_\_\_

Name of Proposer \_\_\_\_\_

Signature \_\_\_\_\_

Address \_\_\_\_\_

I, the Seconder, declare as follows:-

The Candidate has been personally known to me for  
\_\_\_\_\_ years \_\_\_\_\_ months.

To the best of my knowledge, information and belief the statements made by the Candidate on this application form are true and correct: he is a man of good reputation and well fitted to become a member of this Lodge.

[For candidates for Initiation only] The answers given by me to the questions above are true.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 200 \_\_\_\_\_

Name of Seconder \_\_\_\_\_

Signature \_\_\_\_\_

Address \_\_\_\_\_

**Certificate of Master****To be read in open Lodge immediately before the Ballot is taken**I have made due enquiry with regard to the character and qualifications of the above-named Candidate and certify that  
in } \*my opinion  
in } \*the opinion of a Committee of members of the Lodge

MUST BE FULLY COMPLETED BY THE MASTER

he is a fit and proper person to be admitted as a member of this Lodge.

Signature \_\_\_\_\_ W.M., Lodge No. \_\_\_\_\_  
\*delete where applicable**Certificate of Grand Secretary**

I certify that the matters disclosed in connection with this application for membership do not constitute a bar to initiation.

The issue of this certificate is no more than confirmation that there is no overriding objection to the candidate being made a Mason and is not to be taken as an expression of opinion that the candidate ought to be elected.

[The following additional statement shall be made:

Signature \_\_\_\_\_ Grand Secretary

dated this \_\_\_\_\_ day of \_\_\_\_\_ 200 \_\_\_\_\_

**Certificate of Secretary**

I certify this application for membership, together with:

a. the certificate from the Grand Secretary (if the Candidate has made a qualified declaration in A).

b. any adverse report under Rule 158, Book of Constitutions, was read in open Lodge immediately before the Ballot was taken, and that the Candidate was

MUST BE COMPLETED BY THE SECRETARY

\*initiated in

\*became a joining member of

\*became a re-joining member of

} this Lodge on \_\_\_\_\_ day of \_\_\_\_\_ 200 \_\_\_\_\_

Signature \_\_\_\_\_ Sec., Lodge No. \_\_\_\_\_

\* Delete where necessary

CLEAR INDICATION TO BE GIVEN

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 200 \_\_\_\_\_

For details of fees please see letter of instruction

**To be completed by the Lodge Secretary**

(BLOCK LETTERS) Name of Secretary: \_\_\_\_\_

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

Postcode: \_\_\_\_\_

Telephone No. (Home) \_\_\_\_\_

(Work) \_\_\_\_\_

e-mail address: \_\_\_\_\_

This space for the use of the Grand Secretary's office

**ABROAD D.G.L.**

Lodge Number: \_\_\_\_\_

Regn. Fee. £ : \_\_\_\_\_

Total Remittance £ : \_\_\_\_\_

Issue 11 Reg/02/18 CURRENT ISSUE NUMBER

Entd.

## UGLE Registration Form DGL – Pre-send checklist

Prior to sending any Registration Forms, please check that the following sections have been completed:

### Page 1

- Lodge Name, Number, Place of Meeting and District
- Member's Details: Surname, Full Forename(s), Home Address, Postcode (*where applicable*), Telephone Number(s) and e-mail Address (*if any*)
- Member's Occupation, Employer and Business Address (*if retired, the former occupation must be given*)
- Member's date of birth
- Data Protection "Optional charities consent": Candidate to tick boxes which are applicable, if any
- Candidate's signature and date

### Page 2

(Only for Candidates for Initiation or for Joining or Rejoining after being Unattached)

- Declaration of proposal for membership of other Lodges
- Member's signature and date of signature

### Page 3

- Proposer's and Seconder's Answers and Comments (*Candidates for Initiation only*)
- Certificate of Proposer and Seconder including dates and signatures
- Certificate of Master: deleting the statement which is not applicable; signature and Lodge Number

### Page 4

- Certificate of Secretary including status of Member, date of Joining, signature of Secretary and date of signature
- Name and contact details of Secretary; Lodge Number
- Registration Fee, if applicable

(It is recommended that you consult your District Grand Secretary for advice in relation to the submission of fees)

**Note:** Please ensure when inspecting Clearance Certificates that if the Brother is still a member of the Lodge that it confirms that he is up to date with the current years Lodge subscription. If the Brother concerned is no longer a member of the Lodge in question the Certificate must state the reason why he left the Lodge and whether or not he is indebted to the Lodge (Rule 175(ii), Book of Constitutions).

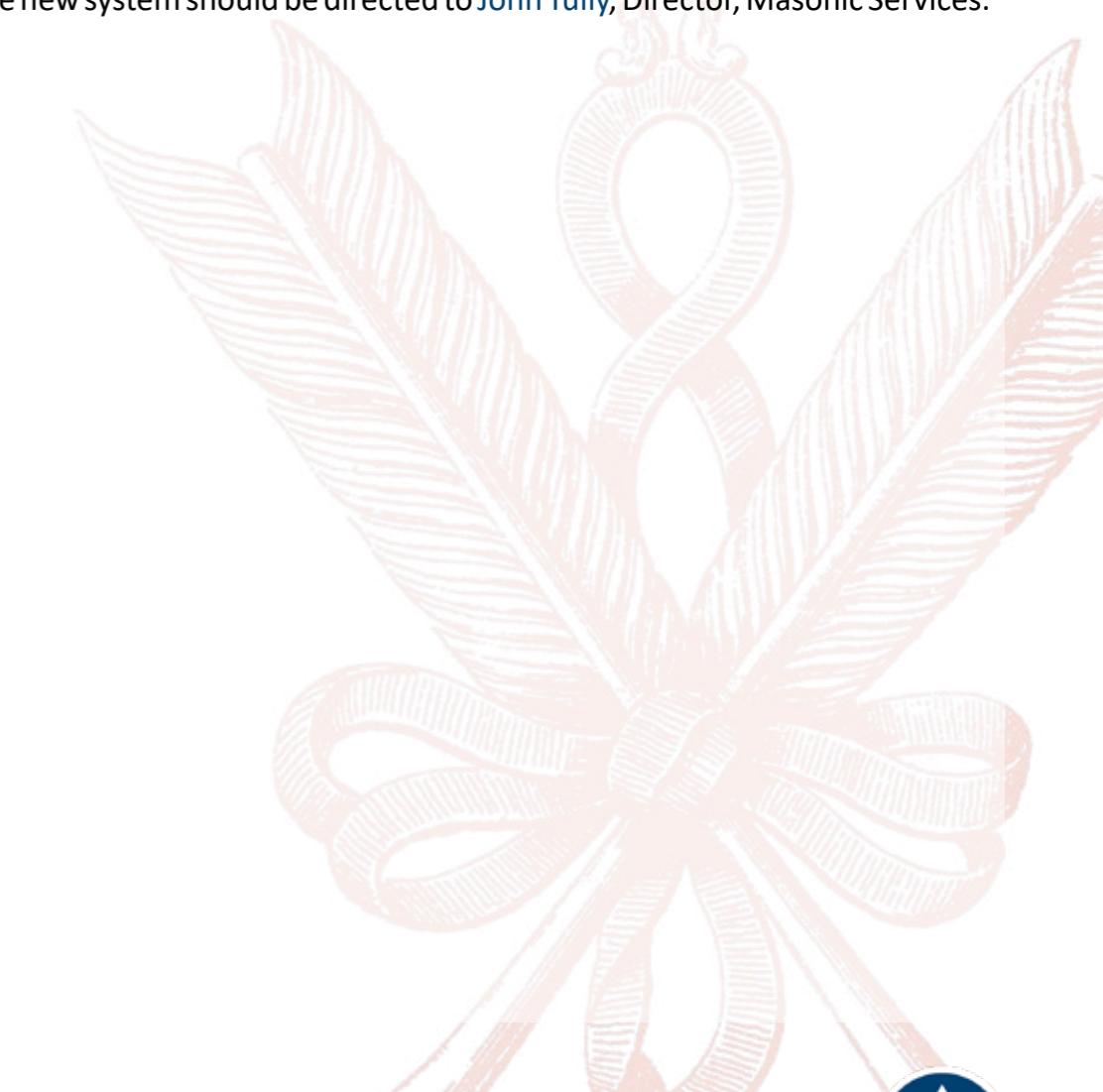
It is also recommended that Clearance Certificates are issued on Lodge headed paper and are signed by the Secretary or Worshipful Master of the Lodge.





## Invitation to Rulers

A new form has been developed for the use of District Grand Secretaries. The sole purpose of the form is to request or invite a UGLE Ruler to attend an event. Any and All invitations or requests must be submitted via this form, which can only be accessed via the members website and is restricted to District Secretaries. Requests or invitations submitted in any other format will not be processed, these will be returned to the District office for further action locally and the submission of a form. District Rulers should direct any invitation via their secretariat so that the necessary form can be completed. Direct contact with UGLE Rulers should be discouraged, if personal contact is made then arrangements for a form to be completed should be made as soon as possible afterwards. Any enquiries regarding the new system should be directed to [John Tully](#), Director, Masonic Services.





### Fostering Curiosity – Developing Understanding

The launch of Solomon, an online learning resource, is making daily advancement a reality in the Craft and Royal Arch

Sir David Wootton, Assistant Grand Master and Chairman of the Improvement Delivery Group, wrote in the Autumn 2018 Edition of FMT that the requirement to learn ritual by rote and then present it without any attempt at providing the most basic of context and understanding fails the candidate, because it overlooks the important messages that lie within.

Member surveys have highlighted learning as a major unmet need and a potential reason why members leave. Solomon has been created as an accessible online resource to stimulate interest and meet current and future needs.

### Who is Solomon for?

Solomon will support the wants and needs of at least three groups:

- Those who want to learn more about their Masonry.
- Those with programme planning or member development responsibilities in a Lodge or Chapter.
- District Officers charged with promoting and providing learning resources and activities.

Solomon will support personal inquiry or study, irrespective of experience or prior knowledge. It brings together material from many sources to help answer common questions and improve Masonic knowledge and understanding. The online resource can be accessed on multiple platforms such as smartphones, tablets and computers and currently contains more than 350 items.

Solomon is also designed to support the interests and requirements of Lodges and Chapters. The Lodge Mentor or Director of Ceremonies will be able to find material to help a member learn about or understand a topic or issue, or may introduce learning content into regular meetings. Solomon material comprises short 'nuggets', papers and demonstrations, as well as longer items for presentation and discussion. A regular presentation of these nuggets at meetings will stimulate a desire to learn more.

Solomon materials will complement material collected locally by Districts and will guide and support them in the advancement of their learning.



## What will I find?

Solomon is devoted to the Craft and Royal Arch. It is organised into three categories:

- Seek & Learn: for individual exploration or presentation.
- Share & Encourage: for use by Lodges and Chapters.
- Support & Promote: for Provinces and Districts.

The first two categories have eight modules covering the Craft, the Royal Arch and more general areas, such as symbolism and history. This arrangement will enable users to focus and drill down to individual nuggets, papers and presentations. It will also help to confine the inquirer to those areas appropriate to his Masonic progress.

Once registered, you can login and enrol in one or more modules and explore Solomon to your heart's content. It is intuitive and has been designed to foster curiosity and draw you in to seek answers. You can use various search tools to find and refine your inquiry. You may then read or download as much or as little as you wish. With smartphone access, Solomon can readily provide an answer to a question at a Lodge of Instruction.

Solomon provides a range of interesting material that will complement or even replace a ceremony.

## How will Solomon benefit a Lodge or Chapter?

Solomon complements the Members Pathway and individual mentoring programmes. These encourage a personalised approach to development. This approach should be extended to develop the interest and enjoyment of all members, enabling them to benefit from a deeper understanding of our ritual and traditions. The result will be improved performance of ceremonies, better mentoring and greater confidence in explaining Freemasonry to others.

Solomon provides interesting and accessible material that, if well chosen and well delivered, will complement or even replace a ceremony. It is designed to be popular, boosting attendance and interest. Ideally, learning activities will become an appreciated and regular feature of Lodge and Chapter meetings.

A 'nugget' is a five to ten-minute item of interest that can be presented by a member. It will easily fit into a meeting; perhaps to set the scene, or to act as a conclusion, or even when the candidate retires. It is also suitable for personal study and can be a resource for Lodge quizzes. It may also lead to a presentation that expands on a topic of interest.

While there may be some who feel there is no time at a meeting, it's hoped that by making time for learning, the benefits will become clear and members will increasingly value time devoted to it. A well-organised Lodge or Chapter will have a programme that reflects the needs and interests of all its members, one which they enjoy and which encourages them to attend. Learning may also extend beyond the regular meeting to a Lodge of Instruction or special Masonic events.

## How can I get involved?

As the success of the UGLE Learning and Development programme depends on local support, the Programme Support Team wishes to work collaboratively with Districts. Solomon therefore includes resources to support local development.

Anthony Howlett-Bolton, *OBE*, Provincial Grand Master for Berkshire, and the Programme Lead, emphasises the key importance of presenting and delivering material in an understandable and engaging way. This takes skill and so Districts are being asked to identify suitable members to be presenters, to develop their skills and to promote their use. The skilled presenter will draw attendance and overcome the negative stereotype of the boring lecture.

The team also wants to share good examples; these include specialist Lodges and working with light blue clubs. A collaborative approach between the Craft and the Royal Arch is encouraged.

Solomon is still in its early stages and will expand in volume, range and diversity. There will always be a need to commission and source new and credible material and the team looks forward to receiving the views and suggestions of Solomon users. For able members eager to write material for inclusion, Solomon provides guidance on the style and other format requirements.

Early feedback on Solomon has been positive from new and experienced Masons alike. David Pratt, Provincial Grand Master for Yorkshire, West Riding, remarked that the nuggets are '*solid gold*', packed with interesting topics to educate even experienced Freemasons. '*They are so easy to access and use. Any Lodge member can lead the activity... I shall be strongly supporting and promoting the use of Solomon within my Province.*'

To access Solomon, go to [solomon.ugle.org.uk](http://solomon.ugle.org.uk)

January 2021

Masonic Services





## Whistle-blowing

Periodically an individual becomes aware of impropriety or wrongdoing, real or apparent, in a Masonic context, which is so serious that it should not be ignored, but which cannot be dealt with by any of the normal Masonic processes. This could be because of the seniority of the Brother or Brethren involved.

In such cases a District will wish to have a reporting procedure to be followed which will give adequate protection against reprisals to a whistle-blower acting in good faith, and which will so far as possible protect his anonymity against the Brother or Brethren the subject of the report.

Details of how to make a report should be readily available without the need for a whistle-blower to ask for them, in order to maintain confidentiality and anonymity, and should be accompanied by:

- a. The names of the individuals to whom disclosure should be made, who may in an extreme case be the Grand Secretary, the Deputy Grand Secretary or the Head of Legal Services at UGLE.
- b. An assurance that a whistle-blower acting in good faith with reasonable cause will, so far as possible, be protected.
- c. A warning that frivolous or vexatious use of the procedure will deprive the Brother concerned of the protection afforded and may result in disciplinary action.

Graham Redman

Donald Taylor





UNITED GRAND LODGE  
OF ENGLAND