

# PROVINCIAL GRAND LODGE OF SOMERSET



INFORMATION FOR SECRETARIES OF CRAFT LODGES.

March 2024

# Contents

1. Book of Constitutions .....	4
2. Provincial Grand Lodge By-Laws .....	4
3. Lodge By-Laws .....	4
4. Lodge Summons .....	5
a) Installation Meetings and Provincial Visits .....	5
b) Installation Representations .....	5
c) Salutations .....	5
d) Emergency Meetings, change of date or venue .....	5
e) Preferred wording for Elections of Master and Treasurer.....	6
f) Rule 158 .....	6
g) Candidates and Joining Members .....	6
h) Ballot and Initiation at the same meeting .....	6
i) Fraternal Visits.....	6
5. Candidates .....	7
a) Candidates for Initiation .....	7
b) Joining Members.....	7
6. Ceremonies .....	8
7. Honorary Members .....	8
8. Membership Returns .....	8
a) When to send:- .....	9
1. As soon as possible .....	9
2. After every Lodge Meeting .....	9
3. After every Installation Meeting .....	9
4. 1.4 During October each year .....	9
b) To Grand Lodge .....	9
1. 2.1 After every Installation Meeting .....	9
2. 2.2 Annual Return .....	10
9. Registration Forms for Initiates and Joining Members (Form P) .....	10
10. Presentation .....	11
a) Presentation of Grand Lodge Certificate .....	11
b) Presentation of Mentoring Booklets .....	11
11. Communications .....	12
12. Risings.....	12
13. Lodge Minutes .....	12
14. Installation Meetings .....	12
15. Appointment of Lodge Officers .....	13
16. Retention of members .....	13
17. Dispensations .....	13
18. Masonic Veterans .....	13
19. Tyler .....	13

20.	Correspondence.....	14
21.	Publicity.....	14
22.	Visits to Lodges Abroad.....	14
23.	Information Regarding the Royal Arch.....	14
24.	Petitions.....	14
25.	Provincial Appointments and Promotions.....	14
26.	Provincial Visits.....	14
27.	Other Societies and Orders.....	15
28.	Qualifications for Initiation. (Rule 157 Book of Constitutions).....	15
29.	Lady Freemasons.....	15
30.	Exclusions for Non Payment of Subscriptions.....	15
31.	General.....	16
a)	The National Anthem.....	16
b)	Festive Board.....	16
c)	Care of Candidates and Conduct.....	16
d)	Sharing of Ritual.....	17
e)	Cheques.....	17
f)	Contact Details.....	17
	Appendices.....	18
1.	Appendix 1- Other Societies and Orders.....	18
2.	Appendix 2 – Provincial Honours.....	19
a)	Appointments.....	19
1.	Past Masters of the Lodge.....	19
2.	Past Masters from another province.....	20
3.	Master Masons.....	20
4.	Promotions.....	20
3.	Retention Flowchart.....	22

## INFORMATION FOR SECRETARIES OF CRAFT LODGES.

This Handbook will answer the majority of the questions and queries that arise during your office as Lodge Secretary, however it does not assume to be exhaustive.

### **1. Book of Constitutions.**

Secretaries should endeavor to make themselves conversant with its contents for, as every Master is told at his Installation; “there is scarcely a case of difficulty that can occur in the Lodge in which that book will not set you right.” Most of the duties of a Lodge Secretary are clearly set out in this book and should be followed at all times. Amendments are issued from time to time and these should be affixed to both the Lodge and the Secretary’s copy, and be kept at the Secretary’s table and on the Master’s pedestal. A current published copy can be downloaded from the UGLE web site. [www.ugle.org.uk](http://www.ugle.org.uk)

Every Worshipful Master and Initiate must be presented with a current copy, together with the Lodge Bylaws. Please ensure that they also receive a current copy of:

“Information for the Guidance of Members of the Craft”

“The Central Masonic Charities, Information for Freemasons and their families”

### **2. Provincial Grand Lodge By-Laws.**

These are printed annually in the Somerset Reference Book.

### **3. Lodge By-Laws**

These should be kept up-to-date at all times. A Notice of Motion for amendments should be given in Open Lodge (Regular Meeting) and printed on the Summons for the next meeting at which the Notice of Motion should be moved, seconded and voted upon.

By-Laws may provide for annual subscriptions to be “of such an amount as the Lodge may from time to time decide by resolution after Notice on the Summons”. Initiation, joining and re-joining fees must be stated. Alterations to these fees must be dealt with specifically each time a change is proposed.

After amendments are approved in Open Lodge, four copies of the amendments signed by the Master and the Secretary must be sent to the Provincial Secretary for approval. The consent of Grand Lodge is no longer required except in the case of a permanent change of venue (Rule 141 i, ii and iii) or the permanent change of a meeting date (Rule 141 iv). Amendments are not effective until Provincial Grand Lodge, or Grand Lodge if applicable approves them, and the Minutes of the Meeting at which the Lodge approved the amendments are approved and confirmed.

The Province will not approve amendments that do not conform to the Model By-Laws as prepared by Grand Lodge, (see Rule 136). Up-to-date copies of the Model By -Laws are available on the Provincial Website and from the Provincial Grand Secretary who should be advised in advance regarding any proposed amendment.

## **4. Lodge Summons.**

Summonses must be sent at least 14 days in advance of a meeting to the Provincial Assistant Grand Secretary at [summons@pglsom.org](mailto:summons@pglsom.org) for acceptance and advice or amendment if required. One copy should be interleaved in the Minute Book of the Lodge.

### ***a) Installation Meetings and Provincial Visits***

Ensure that there is an item on the agenda to receive the Presiding Officer. This will usually be immediately after the opening of the lodge and before the minutes.

Only the Provincial Grand Master, Deputy Provincial Grand Master and Assistant Provincial Grand Masters demand admission and in deference to their high offices should always be proffered the gavel. All other official representatives request admission and must not be proffered the gavel. Past Rulers (e.g. P.P.G.M.) are not offered the gavel.

The Provincial Grand Master **for** the Province of Somerset.

The Deputy or Assistant Provincial Grand Master **of** the Province of Somerset.

### ***b) Installation Representations***

The Deputy and Assistant Grand Masters attend under their own patent.

Where a senior member of the Province is representing the Provincial Grand Master the summons should reflect this with the wording "To receive W Bro. Joseph Bloggs, Provincial Senior Grand Warden representing R W Bro. Raymond Guthrie, The Provincial Grand Master **for** the Province of Somerset"

Grand Officers representing the PGM should be detailed with both their Grand Rank and Provincial ranks. Grand Rank is placed immediately after their name and before their Provincial Title if they have one.

R.W., V.W. or W Bro. prefixes the name not their Provincial title.

With the exception of the PGM, Grand Ranks are placed after the name and before the Provincial Title.

R.W. Bro. Raymond Guthrie, Provincial Grand Master for Somerset.

V.W Bro. Benjamin G W Batley, **PGSwdB**, Deputy Provincial Grand Master

Worshipful Brother Richard J Winter **PSGD**, Assistant Provincial Grand Master

Worshipful Brother Anthony R Guthrie, **PSGD** Assistant Provincial Grand Master

### ***c) Salutations***

The giving of Salutations is a courtesy extended by the Lodge. It is not obligatory and whilst Lodges may wish to accord Salutations to all distinguished brethren present, the Provincial Grand Master prefers that Salutations, where given, be limited to the most senior brother present. The Worshipful Master at an appropriate point in the proceedings may then personally welcome other distinguished brethren.

### ***d) Emergency Meetings, change of date or venue.***

If a lodge wishes to hold an additional or emergency meeting a Dispensation is required and must be recorded at the commencement of the meeting. Dispensations are obtained from the Provincial Secretary. No business which is required to be transacted **ONLY** at a Regular meeting shall be transacted at an emergency meeting. The business at the meeting shall not include anything else other

than that identified on the summons circulated prior to the meeting. The minutes of the previous regular meeting will not be approved and no propositions or other business matters will be dealt with. There are no Risings. There is a fee payable, details of which can be obtained from the Provincial Grand Secretary.

***e) Preferred wording for Elections of Master and Treasurer***

“To elect a Worshipful Master and Treasurer for the ensuing year. The only nominations the Secretary is aware of are Bro. XYZ as Master and W Bro ABC as Treasurer and in accordance with Rule 105(a) and Rule 112(a) respectively, it is proposed to declare the ballot in their favour. Any member may demand a ballot for either office.

It would be advisable for the Secretary at the previous meeting to state that it is proposed to use the new procedure and to invite any qualified brother to inform him by a specific date if he wishes to be considered for Worshipful Master or for Treasurer. If more than one nomination is forthcoming then the normal ballot would be required.

***f) Rule 158***

If a candidate resides and works outside of the Province of Somerset enquiries should be made through the Somerset Provincial Secretary.

***g) Candidates and Joining Members***

Refer to B of C Rule 164 (a and b) for full details which are to be included on the summons of the meeting when the ballot is to take place.

***h) Ballot and Initiation at the same meeting***

In some circumstances it is permissible to ballot for and Initiate a candidate at the same meeting. In these cases, it is first necessary to receive prior approval from the Provincial Grand Master via the Provincial Secretary. Where approval has been granted, a statement to that effect should be included on the summons. On application you should confirm that the Candidate has been properly prepared and given the booklet ‘What’s it all about’

***i) Fraternal and Membership Challenge Visits***

In cases where the lodge is to receive a Fraternal Visit from a Somerset Ruler and members of the Provincial Team, it should be stated on the summons as an agenda item, and placed immediately after the opening of the lodge.

The agenda wording should read “To receive (Ruler name, rank and title) and members of the Provincial Team on the occasion of their Fraternal Visit”

## **5. Candidates.**

### ***a) Candidates for Initiation.***

Before any other action is taken the Secretary must contact the Provincial Adelphi Coordinator (Neil Hawes nbhawes1@talktalk.net ) or Provincial Grand Secretary with the known candidate's details to check if there is any reason recorded on the UGLE's database why a candidate might not be suitable.

In accordance with Rule 164, the following information is required to be included on the Summons at the time of the ballot:

1. Full name.
2. Age.
3. Profession or occupation, (or former if retired) A precise description is essential.
4. Place or places of abode.
5. Business address or addresses.
6. Names of Proposer and Seconder.
7. Date of Proposal in Open Lodge.

In accordance with Rule 158, when Candidates for Initiation seeking admission to a Lodge do not have a permanent residence or regular place of business or employment in the locality of that Lodge, due enquiry must be made with a Lodge operating within that place of residence or business. (As a rule of thumb a 10 mile radius from the lodge may be considered 'in the locality'.) In order to comply with Masonic protocol the Provincial Office will make enquiries outside the Province of Somerset; Lodge Secretaries may complete enquiries within the Province. The fact that this Rule has been complied with must be stated on the Summons at which the ballot is to take place, and the ballot must not take place until a reply to the enquiry has been received.

A prudent Secretary will make a written enquiry under Rule 158 to the appropriate Lodge or Provincial office immediately he receives the Registration Form, giving all details of the proposed Initiate in ample time. Attention is drawn to Rule 164 (a) which requires the Candidates particulars and Master's certificate to be read prior to the Ballot.

If the ballot is successful, the Candidate must be Initiated within one year, or the proposal lapses.

Rule 159 must be complied with in its entirety and a Secretary should be fully conversant with the contents. In particular, Secretaries are reminded that once proposed and seconded a Candidate must be balloted for at the next Regular Meeting or the proposal must lapse.

### ***b) Joining Members***

Before any other action is taken the Secretary must contact the Provincial Adelphi Coordinator or Grand Secretary with the known candidate's details to check if there is any reason recorded on the UGLE's database why a candidate might not be suitable and obtain a list of all lodges from which a Clearance Certificate is required.

It is worth noting that the provision of Clearance Certificates is the candidate's responsibility and not the Secretary's. He only needs sight of the certificate to show that no monies are owed. The certificate or copy of the same should not be attached to the Form P but the Secretary should ensure that all the Lodge names are included on the front page of the Form P.

In the case of Joining or Re-joining members, the same information is required on the Summons with the exception of age, together with the name and number of the Lodge or Lodges of which he is, or has been at any time, a member.

Attention is drawn to Rule 163; in particular Rule 163 (c) and (d). **If the candidate does not produce a Grand Lodge Certificate then the ballot cannot go ahead and further advice should be sought from the Provincial Grand Secretary.** Entered Apprentices and Fellowcraft members CANNOT be accepted for membership until such time as their Raising has been carried out and advice should be sought from the Provincial Grand Secretary as there is a particular process to be followed in such circumstances.

Attention is also drawn to Rule 164 (a) which requires the Member's particulars and Master's certificate to be read prior to the Ballot.

## **6. Ceremonies**

Always try to plan a yearly program for the Lodge so that whenever possible, a reserve Candidate is available for all Ceremonies, again if possible in the same Degree; always state the alternative Candidate on the Summons.

Double Ceremonies are encouraged by the Province, especially double Initiations and Raisings. Please notify the Provincial Grand Secretary when these are being carried out. The prior consent of the Provincial Grand Master is required for multiple ceremonies of three or more.

The Provincial Grand Secretary may be able to advise you of Lodges who are short of Degree work and could assist in undertaking Passing's and Raisings of your Initiates.

Candidates should not be advanced too quickly; ideally, there should be an interval of more than one month between Ceremonies to ensure that they have made such progress as will entitle them to be Passed or Raised. Rule 172 stipulates a minimum interval of 28 days. Separate guidelines for the Interview of Candidates are available from the Provincial Office upon request

## **7. Honorary Members**

Rule 167 clearly states that all Honorary Members must be elected by ballot. An Honorary Member cannot hold office in the Lodge. When an Honorary Member acts in an office of say Organist that office must be shown at the bottom of any Officers List printed on a Summons etc., after the Tyler.

The restrictions of Rule 127 should be drawn to the attention of prospective candidates for Honorary Membership. It is important that Lodges do not lose touch with honorary members. Secretaries and Almoners have a role to ensure their well-being.

## **8. Membership Returns**

To ensure the accuracy of membership records held both by Provincial Officers and Grand Lodge it is imperative that regular returns are received from Lodges quoting UGLE Ref Nos., and indicating all changes using the official forms where appropriate and at the times specified below. These are all sent to the Provincial Assistant Grand Registrar (with appropriate cheques) who will ensure they are distributed correctly.



There are three types of forms that can be used all of which can be accessed through the Provincial website at: <https://pglsomforms.org/SOMS/index.htm>  
Click on the resources tab / Lodge Officers / Lodge secretary and Paragraph 1 will give access to the hard copy and Web forms.

1. Web forms which can be sent direct from a browser (with the Lodge Secretary's typed name used instead of his signature). A copy of what was sent is returned to the sender as an email. This is easily the quickest form of communication.
2. Electronic versions of the forms (Word format with the Lodge Secretary's typed name used instead of his signature) may be sent in as an email attachment.
3. Hard copy (Word or PDF format) sent through the post. This is the least favoured system as it is slow.

#### **a) When to send:-**

##### **1. As soon as possible**

- (i) The death or incapacity of the Master or Master Elect should be notified to the Provincial Grand Secretary immediately.
- (ii) Similarly the death of a Grand Officer or an active Provincial Officer should be reported by telephone immediately and confirmed in writing.
- (iii) Deaths of the above and all other members should be reported using Form **SOM 4**, which also advises of details of funeral arrangements etc. In addition email to Provincial Grand Secretary if possible.
- (iv) Resignations, Cessations or Exclusions. Please use Form **SOM 6**.

##### **2. After every Lodge Meeting**

Form **SOM 2**. This most important return must be completed and forwarded immediately (max 7 days) after every Lodge meeting (Including Installation), since it is the main vehicle for informing Province not only of the work undertaken but of all membership changes. It should be returned whether or not any ceremony was performed, since it also informs of joining members, new honorary members, Provincial honours, veterans, changes of addresses, resignation, deaths, etc.

##### **3. After every Installation Meeting**

In addition to Form **SOM 2** mentioned above, the Installation Return Form **SOM 3**, must be completed and sent to the Provincial Office within 5 days of the meeting.

##### **4. 1.4 During October each year.**

The Annual Provincial Return of Lodge membership at 30th September each year will be supplied by the Assistant Provincial Grand Secretary and must be returned to the Provincial Grand Treasurer with the appropriate remittance by 31st December following. Details of all members should be checked by the Lodge Secretary and any amendments noted on the forms

#### **b) To Grand Lodge**

##### **1. 2.1 After every Installation Meeting.**

Immediately after every Installation meeting, the official Grand Lodge return **LP&A4** (showing Master, Wardens and Past Masters of and in the Lodge) should be completed and forwarded to the Grand Secretary. A copy of this form can be found on the Provincial website at <https://www.pglsom.org/secretary/> **Access via the HARD COPY Web form Tab**. When completed and signed, scan or post a copy off to UGLE.

The advantage of an electronic copy being kept is that it can easily be updated each year saving the Secretary a significant amount of work. As long as the form is signed by the Worshipful Master and Lodge Secretary the form may be scanned and sent to UGLE as an attachment thus avoiding the need and cost of posting.

## **2. 2.2 Annual Return.**

Each year a computer printout Form **AR1**, will be received from Grand Lodge, dated to the end of the month prior to that on which Lodge subscriptions are due, showing the names of all recorded subscribing members. This form should be carefully checked making any necessary amendments as detailed in the Grand Secretary's covering letter. Particular attention should be paid to the correct spelling and full initials of member's names, annotating any necessary deletions and /or omissions.

This should then be sent to the Provincial Grand Secretary with the appropriate remittance made out to UGLE. Payments can be made by BACS transfer, details of which are on the UGLE letter of Instruction each year. If paying by BACS please E mail the Provincial Grand Secretary to advise that payment has been made together with a scan of the AR1. A copy should be retained by the Lodge and carefully filed.

## **9. Registration Forms for Initiates and Joining Members (Form P)**

Registration Form P: Issue 13 Reg /09/19 only is to be used; previous supplies must be destroyed. This Form must be fully completed in the Candidate's own handwriting.

These are supplied by the Grand Secretaries Office and should be completed in accordance with the instructions thereon. These forms are also available on the [pplsom.org](http://pplsom.org) web site under the secretaries section.

Secretaries are reminded that the Certificate of the Master must be read out immediately prior to a ballot, as instructed thereon. Rule 164 (a) (i).

Rule 164 (a) (ii) states "If a candidate for Initiation or a candidate for joining or re-joining who is unattached in accordance with Rule 127, is unable to make the declaration required of him in the form without qualification, the form with the Master's Certificate duly signed together with an account of the circumstances shall be transmitted to the Grand Secretary".

There are a number of important things to watch out for when completing a Form P and these include.

- Page 1. Make sure the Profession/Occupation is shown correctly. Please see the line written under request for this information.  
It says 'A PRECISE DEFINITION OF OCCUPATION OR FORMER OCCUPATION IF RETIRED IS ESSENTIAL. TERMS SUCH AS COMPANY DIRECTOR OR CIVIL SERVANT ARE NOT SUFFICIENTLY DESCRIPTIVE.'  
Please follows these guidelines.
- Page 1. Make sure all lodges are declared.
- Page 2. Absolutely nothing must appear on this page regarding any offences – perceived or otherwise. If you think there might be a problem check with either the Provincial Grand Secretary or the Provincial Adelphi Coordinator.
- Page 3 Question 9. The question is 'why do you think the candidate would be interested in Freemasonry'. Make sure that the Sponsors have not just entered their names. The form is poorly designed and leads the unwary into making a mistake.
- Page 3. Make sure the WM signs the Certificate of Master.
- Page 4. Don't forget to fill in the Certificate of Secretary.

- Page 4. Make sure you fill in the final section with your name and address etc.
- Make sure the candidate has given his full name. All given or Christian names **MUST** be given.
- Make sure that any cheque that is sent with the Form P is:-
  - 1) Made out to UGLE
  - 2) Is for the correct amount.
  - 3) A Lodge cheque that bears 2 signatures. Personal cheques are not acceptable.
- Check all the items have been correctly completed before sending to the Provincial Adelphi coordinator. If it is wrong, it will be returned for correction which is a waste of time, money and effort.

**Immediately** after Initiation or admission as a Joining or Re-joining member, the Form should be certified by the lodge Secretary and sent with the appropriate fee to W Bro Neil Hawes. Whose address is in the blue Somerset Reference book. (There is no fee for a Joining Member unless he is coming from a foreign constitution e.g. Scottish.)

**Immediately** after a Raising, application must be made to the Grand Secretary on Form **LP&A5** for a Grand Lodge Certificate; no fee is payable. This may be done in one of three ways.

- 1) Using the web form LP&A5. **This by far the preferred method** as the Grand Lodge Certificate will be received far quicker than by using any other method.
- 2) Using the electronic LP&A5 form annotated as such which is to be sent as an email attachment direct to [registration@ugle.org.uk](mailto:registration@ugle.org.uk) and copied to the Provincial Adelphi Coordinator
- 3) Using the postal **LP&A5** form supplied by the Grand Secretaries Office which must be sent to the Provincial Grand Secretary and copied to the Provincial Adelphi Coordinator. This method is slow and should be avoided if possible.

## 10. Presentation

### ***a) Presentation of Grand Lodge Certificate***

A Brother's Grand Lodge Certificate should be presented to him in Open Lodge whenever possible and he should sign it at the Secretary's table. (See Rule 174 (d) for situations when this is not possible).

At the time of the presentation of a Grand Lodge Certificate, the member should be informed, either by the presenter of the Grand Lodge Certificate or the Lodge Royal Arch Representative, of the desirability of joining the Royal Arch, and be handed a copy of the joint letter signed by the Provincial Grand Master and the Grand Superintendent of the Province regarding the Royal Arch Degree. (See also paragraph 19).

### ***b) Presentation of Mentoring Booklets***

After Initiation the Candidate will receive personally a letter of welcome from the Provincial Grand Master together with a copy of the Provincial Booklet "Somerset Initiate's Guide".

You should ensure that the presentation of the relevant Degree Guide takes place after the conferment of each degree. These booklets are issued automatically to the Lodge Mentor.

The Mentor in Open Lodge should present each booklet, and a record entered in the Lodge Minutes.

## **11. Communications**

Grand Lodge Communications are emailed to Lodge Secretaries, a copy must be made available to the Master and any Brother requesting one. The Brethren should be made aware of this in the First Rising.

Communications regarding Charities, either from Grand Lodge or the Province, are always sent first to the Lodge Secretary but it is important that these are passed direct to the Lodge Charity Steward without delay. The Charity Steward should then report this at the next Regular Meeting, either during his Charity Report, if given, or under an agenda item "To receive correspondence", or under the First or Second Rising as appropriate.

Lodge Secretaries, Charity Stewards, Almoners and Mentors are encouraged to make all communications available to the membership, by the most convenient and all inclusive method.

## **12. Risings**

The purpose of the Risings is to acquaint members with proceedings and correspondence from Grand Lodge and the Province. Letters or relevant extracts from letters should read but all communications intended for the membership should be emailed so all are included. (See 11)

## **13. Lodge Minutes**

Lodge Secretaries are encouraged to circulate copies of Lodge Minutes to all their members with the Summons for the following Meeting. This has the advantage of keeping all members informed of proceedings, particularly those unable to attend regularly. The Minutes can then be taken as read at the following Meeting thus saving much time.

Secretaries are reminded of Rule 144 (ii) regarding the recording in the Lodge Minute Book of the names of all visiting Brethren together with the names and numbers of their Lodges and their Masonic rank; reference to the Lodge Attendance Book within the Minutes is not sufficient.

However, it is acceptable for a photocopy of the page(s) of the Attendance Book to be affixed to the Minute Book, each sheet to be initialled by the Secretary. All addendums added to a Minute Book in any form should be so initialled.

## **14. Installation Meetings.**

Lodge Secretaries will be notified within 6 weeks as to who will be representing the Province and as to which the Provincial Grand Director of Ceremonies or one of his Deputies or Assistants will be attending. Invitations and Summonses should be sent direct to these Brethren at the appropriate time. A Report Template will be included for completion notifying all the data required by the Province to complete the Honours system, (see 25)

The Summons must state who, from the Province is officiating. When the Provincial Grand Master is being represented the Brother's name must be stated together with the fact that he is representing the Provincial Grand Master. The Deputy and Assistant Provincial Grand Masters attend in their own right. They do not represent the PGM.

At the Festive Board the Toast to the Provincial Grand Master (if present or to the Province in other circumstances) is to be proposed by the nominated Past Master or in his absence the Master. NB. When the Provincial Grand Master is present the Toast is to him personally. Care must be taken to ensure that the Master is familiar with and has rehearsed the Toast List.

Please avoid other business, e.g. Ballots etc., at Installations Meetings unless absolutely necessary.

## **15. Appointment of Lodge Officers**

There is a need to ensure that the Master Elect and those invited to accept a Lodge office are fully aware of the work and commitment required. The role of Almoner, Charity Steward and Mentor require particular skills that are set out in guidelines on the Secretaries webpage. It is recommended that those filling these roles do so for a minimum of three and a maximum of five years.

## **16. Retention of members**

It is important to recognize early when a member does not appear to be enjoying his membership or fails to attend meetings on a regular basis. Resignation need not be inevitable and a Proposer, Secunder, Mentor and Almoner all may have a part to play in retention. Secretaries should have an overview of a member's well-being and should alert the appropriate Lodge Officer of any concerns. The Provincial Office can often find a Lodge more suited to a member's needs and will assist in finding a new Lodge if a member has to move out of the Province.  
(See Appendix 3 for suggested retention procedures).

## **17. Dispensations.**

A change in the date, or venue, of a Regular Meeting or the holding of an Emergency Meeting can normally only take place by Dispensation of the Provincial Grand Master. An application should be made in good time to the Provincial Grand Secretary, (see Rules 139 and 142). There is a fee payable.

It doesn't need to be read in Open Lodge, if it's for Rule 139c, 140, 142. , but it does need to be reported and recorded in the minutes.

The correct wording for the summons is "To report the grant of a Dispensation for the change in date of the meeting/an emergency meeting/the change in the place of meeting".

Dispensations for a Brother to be Worshipful Master in two Lodges simultaneously are issued by and from the Grand Master at UGLE. Please source this through the Provincial Grand Secretary.

## **18. Masonic Veterans.**

The Provincial Assistant Grand Secretary should be notified well in advance by email please (in addition to the entry on the **SOM 2**) of Brethren achieving 50/ 60/ 70 years in Freemasonry. This will enable Veteran Certificate plans to be undertaken.

Please ensure that the Veteran's correct name, Masonic rank and address are up-to- date and also advise if the Brother is able to attend Lodge to be presented with his Certificate, or whether alternative arrangements should be considered.

A copy of the Certificate will be sent to the Secretary to retain in the Lodge Minute Book if requested.

## **19. Tyler.**

See Rule 113, Book of Constitutions.

## **20. Correspondence.**

No communications are to be sent or made to Grand Lodge, (except G.L Returns and orders for publications etc.).

All queries must be directed to the Provincial Grand Secretary.

Lodge Secretaries should make their own enquiries in respect of other lodges within the Province of Somerset. External enquiries to lodges outside of the Province must be directed through the Provincial Grand Secretary

## **21. Publicity.**

Do not give interviews or statements to the media on Masonic matters.

Always refer media enquiries to the Provincial Communications Officer, who will consult with the Provincial Grand Master.

## **22. Visits to Lodges Abroad.**

Grand Lodge **requests** that the following specimen entry is included on Lodge Summonses at least once a year: “Brethren who are travelling abroad are reminded that they should not make any Masonic contacts overseas with members of other Jurisdictions without first having ascertained by application to the Grand Secretary at Freemasons’ Hall the existence of Regular Masonry in the country concerned, and the address to which Masonic enquiries should be directed”.

## **23. Information Regarding the Royal Arch.**

At least once each year it should also be stated on the Lodge Summons that a Master Masons’ knowledge of pure Ancient Masonry is incomplete until he has been exalted into The Supreme Order of the Royal Arch.

A Master Mason should also be made aware of this when presented with his Grand Lodge Certificate, a letter from the Provincial Grand Master and the Grand Superintendent will be presented at the same time.

## **24. Petitions**

In line with the new initiative of “Freemasonry Cares”, Brethren may apply for assistance to their Lodge Almoner or direct to the Masonic Charitable Foundation using the Freephone telephone number **0800 035 60 90**. Following assessment, the Charities will assist and support where possible. The Provincial Grand Almoner will continue to advise and support Lodge Almoners and oversee applications.

## **25. Provincial Appointments and Promotions**

Lodge Secretaries are encouraged to make recommendations of suitably qualified Brethren for consideration of appointment to Provincial Grand Rank or subsequent promotions. Guidelines for recommendations are shown at Appendix 2

## **26. Provincial Visits**

Details of the protocol to be followed when considering a Provincial visit is laid down in the Director of Ceremonies handbook (Secretaries webpage).

## 27. Other Societies and Orders

From time to time, applications for membership are received from Gentlemen who are or have been members of other Societies and Orders.

Please refer to Appendix 1 for a list of Organisations that are incompatible or compatible with membership of the Craft.

## 28. Qualifications for Initiation. (Rule 157 Book of Constitutions)

Grand Lodge has decreed from 1st January 2021 that no person shall be made a mason under the age of 18yrs **and ONLY** if he has ceased full time secondary education or training.

Should you have a candidate who falls within this classification please liaise with the Provincial Grand Secretary who will advise you..

## 29. Lady Freemasons

The R.W. Provincial Grand Master has given his consent for Lady Masons to hold meetings in our Masonic Halls, on the proviso that the following conditions laid down by the Board of General Purposes are strictly adhered to:-

- a) The Lady Freemasons must have sole occupancy of the whole of the Masonic Hall during the time that they are present, and no male Freemason may therefore be admitted to the premises for that period except in so far as he may be present in another capacity, such as caretaker or catering manager; and
- b).The Lady Masons, whilst they may use items of furniture, such as chairs, pedestals, candlesticks and wands, which are part of the standard fittings of the Lodge Room and are in communal use, may not borrow items which are the private property of an individual Lodge, such as bibles, working tools collars and jewels.

The Board of General Purposes considers the first of those conditions to be essential and believes that it is likely to be regarded as no less important by those in the corresponding positions in the two organisations to which, and which alone, this policy extends, namely “The Honourable Fraternity of Ancient Freemasons”, and “The Order of Women Freemasons.”

For further information please contact the Provincial Grand Secretary.

## 30. Exclusions for Non Payment of Subscriptions

**Rule 148** – Cessation of membership (not to be confused with Rule 181).

Any member who has not paid his subscription for two full years ceases to be a member.

**His membership expires immediately and automatically.**

There is no need to give him due notice of this event (though reminders will no doubt have been sent to him previously). The fact that his membership has expired should be reported in open Lodge at the next meeting and recorded in the minutes. A member thus expired can apply to rejoin the Lodge under the usual procedures of proposal, ballot etc. but must first pay any arrears.

**Rule 181** – Exclusion of a member. This sets out the strict procedure to be followed if a Lodge wishes to exclude a member – usually for late payment of his subscription. (The Lodge By-Laws will stipulate the payment period when the member will become liable for exclusion e.g. after 6 months non payment) Exclusion is by ballot in open Lodge at a Regular meeting. Note that a written notice must be sent to the member by Recorded Delivery (Registered post is no longer available) at least 14 days before the meeting, and the members must have at least 10 days notice of the ballot, usually by an item on the summons. The notice to the members must not name the offending brother, and of course if he pays

up before the meeting the ballot will not be necessary. If the member is more than twelve months overdue at the date of the meeting there is not much point in applying Rule 181 as the Lodge will already have incurred Capitation Fees etc. for the second year, and if he does not pay up his membership will expire under Rule 148 without the need for the extra paperwork and ballot. The Lodge Secretary should ensure that cessations of membership for whatever reason are reported to Province and Grand Lodge on the appropriate returns, otherwise the Lodge will be charged Annual Dues for subsequent years.

## **31. General**

### **a) *The National Anthem***

When this is to be sung in the Lodge at the closing then it should be the subject of a separate announcement after the Closing Ode. It is considered derogatory to the dignity of the Reigning Monarch to announce, "We will now sing the Closing Ode followed by the first verse of the National Anthem".

### **b) *Festive Board***

It should be noted that the gavel is the emblem of power of the Worshipful Master, and his alone. The Provincial Grand Master would like all Lodges to adopt the correct practice of only the WM and Wardens having gavels at the Festive Board, as is the case in Lodge. As the Worshipful Master's D.C. it is practical for him to sit immediately to the left of the I.P.M. This makes for ease of communication between him and his W.M.

The Provincial Grand Master and the other Rulers between them enjoy (for the most part) attending over 60 Lodges a year. In addition, since the introduction of the Provincial Fraternal visits, the work load has increased. They and many of the guests may have travelled some distance to be with the brethren of a Lodge to celebrate this special event. They would however request that the proceedings be run with dignity and efficiency in order that they may leave the proceedings at a reasonable time, again bearing in mind that they may have some distance to travel home.

As a guide, any Ruler or representative of the PGM would expect to leave any regular Lodge meeting no later than four hours after the published start time. For an Installation meeting this is extended to four and a half hours and this would normally be reflected by an earlier start time.

### **c) *Care of Candidates and Conduct.***

It is imperative that Candidates and other new Members are always made welcome and not allowed to become isolated at Lodge meetings. Always ensure that arrangements have been made by the Lodge Mentor for brethren to be accompanied in Lodge and when required to retire during a superior degree by Personal Mentors.

Further knowledge gained from the Membership Focus Group survey tells us that some members feel that they are being pressured to progress in office and that there is an element of being bullied into reaching the chair. We must always be watchful for this type of behaviour and mindful that this should never be allowed to exist in our lodges. Newer members must be allowed to progress at a pace that they are comfortable with and not at a pace that suits the lodge.



### ***d) Sharing of Ritual***

The Provincial Grand Master is keen that every opportunity is taken to share out Ritual. This can alleviate pressure on Brethren who struggle to learn or deliver Ritual. It is also an ideal way of building the confidence and enthusiasm of junior brethren and or retaining the interest and involvement of Past Masters.

### ***e) Cheques***

All cheques must be non-personal and have TWO signatures

It is strongly recommended that Lodge Secretaries have an Assistant Secretary familiar with the work, and it is a good idea to prepare a Job Specification particular to that Lodge so that in an emergency, a successor will be able to pick up the work with the minimum of disruption – always remember to allow your Assistant to assist!

### ***f) Contact Details***

The Provincial Grand Secretary and Provincial Assistant Secretary will always be pleased to give any advice or assistance and can be contacted at the Provincial Office : E mail [provsec@pplsom.org](mailto:provsec@pplsom.org) or [littlehavers@icloud.com](mailto:littlehavers@icloud.com)

In emergencies the Provincial Grand Secretary can be contacted on:- Mob 07926 072799

If unavailable the Provincial Assistant Grand Secretary can be contacted on: Mob 07979 778793

Lodge ties and a publication entitled “The Lodge Secretary” by Charles J. Carter is worthily recommended. This is available from the Provincial Charity Steward Graham Puddy.

Michael J Greedy  
Provincial Grand Secretary  
March 2024

# Appendices

## 1. Appendix 1- Other Societies and Orders

Grand Lodge has never published a list of organisations that are incompatible or compatible with membership of the Craft. There are so many of them and some of them are born and die so quickly that they 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.

These include:

- Order of the Eastern Star
- International Order of Co-Masonry

2. Other organisations falling in GROUP A are:

- Ancient Mystical Order Rosae Crucis (not to be confused with the Societas Rosicruciana in Anglia in GROUP B).
- Atheneum Grand Lodge.
- Association des Juristes European Macons.
- Groupement Interprofessionel du Tourisme European ('GITE'). Hiram Grand Lodge.
- Independent United Order of Mechanics. Job's Daughters (associated junior organisation of the Eastern Star). King Solomon Grand Lodge.
- Loyal Order of Moose.
- Order of De Molay for Boys (equivalent of Job's Daughters and Order of Rainbow for Girls).
- Order of Rainbow for Girls (associated junior organisation of the Eastern Star).
- Royal Knights of Justice.
- Universal League of Freemasons ('LIGA').

### **GROUP B –Organisations compatible with membership of the Craft.**

- Buffaloes, Royal Antediluvian Order of
- Orangemen B'nai Brith
- Rechabites Druids
- Rotary Fellowship of the Services
- Round Table Foresters
- The Most Venerable Order of the Hospital of St. John of Jerusalem
- High Twelve Club
- Lion Club Societas Rosicruciana in Anglia
- National Sojourners Sons of England
- Oddfellows
- Any other names should be referred to the Provincial Grand Secretary.

## **2. Appendix 2 – Provincial Honours**

All the appointments and promotions to Provincial ranks are made by the RW Provincial Grand Master. The Honours system is to reward Brethren for their service to our Order. The rank awarded is based on the quality of the contribution each Brother has made to his Lodge, to the Province and to Freemasonry generally.

The collation of nominations for Provincial Honours is undertaken by the Deputy Provincial Grand Master and presented to a Committee consisting of the Deputy and Assistant Provincial Grand Masters chaired by the RW Provincial Grand Master. The Committee normally meets in November of each year.

The number of appointments and promotions made each year by the Provincial Grand Master is based upon a factor of the number of Brethren in the Province.

Selection is based on visiting reports submitted over several years by the Provincial Rulers and by the Provincial Grand Master's representative.

Lodge Secretaries are invited to submit details of brethren in advance of the Lodge Installation meeting of those brethren that the Lodge would wish considered for appointment or promotion.

Nominations may however be submitted at other times to the Provincial Grand Secretary.

The Provincial Grand Master is keen to ensure that brethren are not overlooked who have previously given good service to their Lodge and who remain interested and supportive but because of age, infirmity or distance are prevented from further active involvement.

To ensure that deserving brethren are not overlooked it is important for good records to be kept and for newly appointed Lodge Secretaries to consult their predecessor or other Past Masters when making recommendations.

Great care is taken by the Committee to endeavour to achieve an objective and appropriate decision.

This process is greatly helped by full details provided by the Lodge Secretary using the criteria below.

### ***a) Appointments***

#### **1. Past Masters of the Lodge**

Every Brother who has been installed as the Master of his Lodge at least six years ago **qualifies** for consideration, [i.e. for the **2025** Honours the applicant must be an Installed Master prior to the qualifying date of **31 December 2019**].

This **does not** mean that he will receive an appointment after six years; it only means that he qualifies for consideration on the basis of length of service.

The Appointments Committee will consider the service of those eligible for consideration using criteria including

- A Brother's service in the Lodge,
- Whether he has occupied one of the "administrative offices" such as
- Secretary,
- DC, Almoner, Treasurer, Mentor
- Any ritual which has been undertaken by him,
- His attendance record, and
- Whether he has made any contribution to his Masonic Hall or service to the community, etc.

This information together with details of the Brother's age, occupation and other relevant personal details is to be forwarded by the Lodge Secretary to the PGM or Visiting Officer in response to the Installation notification letter.

Acting Rank is reserved for Brethren who have shown particular merit and are considered able to participate in the activities of the Provincial Team.

The highest Past Rank that will be given on first appointment is usually Past Provincial Junior Grand Deacon.

The rank of Provincial Grand Steward is a very special office and may also be used to encourage particularly active and often younger Brethren. This can be awarded at any time after the Brother becomes a Past Master.

## **2. Past Masters from another province**

Past Masters who have joined from another Province and have played an active part in the activities of their Somerset lodge may be considered for Somerset Honours under Rule 69. Consideration would normally be given no earlier than 6 years after reaching the Chair for the first time or 3 years active service to their Somerset lodge, whichever is the later.

## **3. Master Masons**

Master Masons who have given good service to their lodge over a long period may be considered for Provincial appointment. They will be assessed using the criteria above and should have been a Master Mason for at least 12 years.

## **4. Promotions**

Brethren are eligible for consideration for a further Promotion eight or more years from the last appointment or promotion. [i.e. for the 2019 Honours he must have had his last Appointment or Promotion on or before April 2011]. An application for Promotion can be submitted at any time, however it will normally be considered following the Lodge Installation meeting. The criteria used are the same as those used for Appointments. Again, it is important to stress that this does not mean that he will receive a promotion after eight years; it only means that he **qualifies** for consideration on the basis of length of service.

As a general rule the timing of promotion follows first appointment given for service to the mother lodge. Service to other lodges may shorten the interval to next promotion but the standard interval should be assumed to be the norm.

Promotion is normally considered within the range of Past Provincial Senior Grand Deacon to Past Provincial Grand Registrar according to services rendered in the intervening period.

Exceptionally promotion to Past Provincial Junior Grand Warden may be appropriate as a second or more commonly a third promotion.

It should be noted that promotion to Past Provincial Senior Grand Warden is an infrequent honour. Generally no more than 3-4 appointments will be made to this rank each year. It would be usual for the brother's service to have extended beyond one Craft Lodge.

It is possible, of course, for a Brother to receive more than one promotion during his life as a Craft Freemason. It is also possible not to receive an appointment to Provincial Rank if a Brother has not contributed sufficiently to his Lodge during his Mastership or after becoming a Past Master. Likewise, it is possible for a Brother to receive no promotion if he has given little or no contribution since his appointment to Provincial Grand Lodge.

The Provincial Grand Master may appoint or promote brethren who have given service to the Province over and above that given to their Lodge.

Brethren who have been appointed to the Executive or other Acting Provincial Rank may be considered for further promotion sooner than 8 years.

### 3. Retention Flowchart





