

Instructions and Guidance For the Investigating Committee



**Adapted from a pamphlet issued by the Grand Lodge of
Wisconsin F. & A.M. Committee on Masonic Education and
various online resources**

**For Waverly Lodge Standards and for Issuance to Members
selected by the Worshipful Master to serve on the Committee
charged with this task**

October, 2009

Investigation Committee Notice

Hall of Waverly Lodge Number 51, Appleton, Wisconsin

Committee Members:

- (1) (Chairman)
- (2)
- (3)

At a stated meeting held on _____ you were appointed a Member of an Interview Committee on the Petition of _____
for: ___ **Degrees** ___ **Affiliation** ___ **Plural Member of Lodge**

Birth Date: _____ His age is: _____
Residence: _____
Residence Phone: _____
Mobile Phone: _____
Email Address: _____
Place of Business: _____
Occupation: _____
Business Phone: _____

Also, that he is a believer in a Supreme Being and has lived in this State six months or more preceding the date of his petition.

Recommended by the following Brethren:

- (1)
- (2)
- (3)

Your written report to the Master will be due on or before the Stated Communication of: Tuesday, _____.

You are urgently requested to report before said date so as not to delay action on petition. If you cannot serve on this committee, notify the Worshipful Master at once. Kindly read the guide following this form as to the duties of the Committee.

Fraternally Yours,

_____, Secretary

Secretary's Phone: _____

_____, Master

Master's Phone: _____

Dear Brother:

You have been appointed by your Worshipful Master as a member of the committee to investigate the petitioners for the degrees conferred by this lodge. This may be a standing appointment to the Master's Board or a case by case appointment in which event the name and address of the petitioner appear on the enclosed forms or the forms issued to the Committee Chairman.

You must remember that it is highly possible that you and your fellow committee-men will be the only members to see and talk with the petitioner in his own environment. You must bear constantly in mind that membership in the Craft is too priceless to be shared without due consideration.

You must also remember that your visit to the petitioner is the first official Masonic contact he has ever experienced and that our ancient procedure, though familiar to you, is new to him.

Standards of the Investigation

You are required to call on the petitioner at his home and urged to call on him at his place of business if such procedure is feasible. His business and personal character references should also be contacted if offered. If the petitioner is married, or residing with a partner, it is highly desirable that the home interview be conducted in the presence of his spouse or significant other so that any questions or concerns may be promptly addressed.

You are to conduct your interview in a friendly, social way and to an extent that will enable you to determine if the petitioner believes in Deity, if his moral and mental standards are satisfactory, if he is physically qualified, his motives in petitioning, and if his acceptance would create financial or domestic problems.

Some suggestions for determining your answers are:

(a) Belief in Deity

Does he attend a church or similar place of worship? Which One?

In what faith was he baptized?

What is the faith, if any, of his Spouse or Significant Other?

What is the faith, if any, of his parents?

Does he believe in the sanctity of a Holy Oath?

If a non-traditional religion, on what book or object would he take his obligation upon and consider it binding as if taken on a Bible?

(b) Moral Standards

Is he profane or vulgar in speech?

Does he have any criminal record (except traffic violations)?

If a veteran, how was he discharged?

Is his home life happy?

(c) Motives in Petitioning

Where and when born?

How long has he lived in your lodge's jurisdiction?

Why did he petition?

Why did he select your lodge to petition?

How long and how well does he know his sponsors?

What are his ideas or impressions of the character of the Craft?

What does he expect to receive from his membership?

What does he expect to offer the craft from his membership?

Has he any Masonic relatives or coworkers?

(d) Financial or Domestic Problems

Can he afford the Petition and Degree Fess?

Can he afford the annual dues?

Does his Spouse or significant other and family approve of his joining?

Does he and his family understand that Masonic membership does not incorporate any unemployment, hospitalization or death benefits (insurance) whatever?

(e) Loyalty to Country

Disregarding political party lines, does he declare himself to be loyal to the American form of government (representative democracy)?

Would he willingly take an oath of allegiance to the United States of America?

Will he willingly swear non-affiliation with any subversive group or organization?

Note that citizenship is not a requisite of Freemasonry; however, the Petitioner should be a legal resident.

You should be able to evaluate the mental standards of the petitioner at the conclusion of the interview. Make sure he understands the requirement of memory work as part of his degrees. Whether or not the petitioner is physically qualified is a matter that rests within the discretion of your lodge. Your report should list any revealed mental or physical conditions other than normal.

You are to perform this duty as soon as possible and return the attached report forms properly and fully completed to the Secretary of the Lodge or the Chairman of the Master's Board, if any. If, for any valid reason you are unable to do so, advise the Worshipful Master immediately. It is expected for your report to be placed on file before the next stated communication after the petition is placed for investigation or the date specified by the Worshipful Master.

An actual, personal investigation, in fairness to both the Petitioner and the Lodge, must be completed and reported.

Duties and Responsibilities of the Committee

Responsibilities

The Lodge Brothers who are appointed by the Worshipful Master to serve as a member of the Investigative Committee should consider such appointment to be a high honor because it is a visible expression of the implicit trust and confidence in not only his ability, but his concern for the welfare of the lodge, its Brethren and Freemasonry. Much like the Tiler, the Masonic Lodge Investigative Committee must make sure that no man not fitted for the teachings and blessings of Freemasonry be allowed to pass through the West Gate to initiation.

In the Charge at Raising, our duty in this respect is clearly and unmistakably pointed out to us: "To preserve the reputation of the Fraternity unsullied must be your constant care." Besides being an admonition to us in the daily conduct of our lives, it also includes the acceptance of petitioners.

Duties

As members of the Investigative Committee, you are answerable to no one except your conscience. Your Lodge and Freemasonry are dependent upon your best efforts and keen judgment. You are screening a person who has the ability to make the structure of Freemasonry within your lodge either stronger or weaker by his very presence. It is, therefore, your solemn duty to perform the following checklist upon yourself before you begin to investigate a candidate.

Unbiased Opinion: Each member of the Masonic Investigative Committee must be unbiased by improper solicitations and uninfluenced by any possible mercenary motives by the Petitioner, other Brothers or well meaning friends or relatives of the prospect. Remember: You are simply searching for more light.

Friendly, Curious, Helpful, Professional Manner: After introductions, the Masonic Investigation begins by asking questions of the candidate as well as of his chosen references and any other contacts who have knowledge of his character and reputation. Be prepared to ask lots of questions in a friendly, curious, helpful and professional manner. Because the candidate knows very little about Freemasonry, at this very moment, you and your Masonic Investigative Committee team represent the whole of Freemasonry to the prospective candidate.

Stay on Topic: Because you represent the whole of the craft of Freemasonry to the Petitioner, do not digress (go off topic) and begin to tell a long story about yourself, your uncle, your initiation, your Past Master experiences, etc. This is very unprofessional and while the Petitioner may listen politely and smile or laugh, appropriately, this is not of benefit to the Petitioner.

Your Attire: Dress plays a part in the impression the lodge and the Fraternity will make on the petitioner and his family. Dress appropriately, but don't over dress or under dress for the interview. Just as you will judge the impression the petitioner makes on you; know that he, too, being human, will be judging you (and Freemasonry).

Question His Petition Signers: Ask questions of everyone it is possible to contact, beginning with talking to the Brothers who signed his petition. Ask them why they signed his petition. Require answers beyond, "He just wants to be a Mason". Find out what they really know about him, how long they have known him, who introduced them to him and why. Ask them for names of people they know who are associated with the petitioner or know him personally. If he is relatively unknown to his signers, you should exercise additional due diligence during his interview process.

While there is a long list of do's and don't toward making a good first impression, since you are an adult, simply make it obvious that you and your Masonic Investigative Committee have taken care to make a good impression. This will tell the petitioner and his family, in a subtle way, that the lodge members are proud of their fraternity and are particular about who gains admission to its society and its customs.

The committee must seek the truth about the depth of the character of all whom they investigate. Just as importantly, they must consider the financial circumstances of the petitioner, the organizations he is already involved in, the kind of company he keeps, the reputation he has in the community, in his work place, and with the general public he comes in contact with every day.

Instructions to Masonic Investigative Committee Members

The best interests of Masonry demand that an exhaustive investigation be made of the character and standing of each and every applicant. It is, therefore, imperative that your investigation of the petitioner be thorough.

Visiting the Petitioner: The LAST STEP in the process of investigating a prospective candidate should be the personal interview with the petitioner in his home WITH HIS FAMILY PRESENT.

Make an Appointment: When you request your appointment to visit with the petitioner, make sure you make it clear that you need some uninterrupted time without the possibility of a conflict. Just as you can't hold a conversation while the TV is on, neither should you schedule interviews on Monday night during football season, on a holiday, etc. This is the beginning of a new relationship, both for the petitioner and your lodge. Neither the petitioner's heart nor his mind is likely to be on the interview, and yours probably won't be there either!

Take mental note of the following:

1. Does the petitioner welcome you unhesitatingly into his home?
2. Does his wife greet the Masonic Investigative Committee warmly and make a genuine attempt to make you feel at home or is she merely tolerating your presence? Any one who is expected to spend many hours and a sum of money with a fraternal organization must have the support, with little or no reservation of his wife and family.

Any man who is torn between two commitments, especially when one is wife and family, is going to solve his problem by negating one of his commitments and it is likely to be the Fraternity. Spending many hours initiating a man, teaching him the ritual and developing a reliance on his contributions to the lodge is a useless expenditure of time and money if there is doubt from the beginning that he will be a committed member.

The Interview: While there may well be settings other than a home interview, the home interview is deemed the best because you will get a feeling of the man, himself, his family, his surroundings, any other organizations he is a part of, etc.

Good manners dictate that you will interview the petitioner in the room of the house into which he invites you. This will probably be the room which he and his wife feel most comfortable in or are the proudest of. If possible, however, conduct your interview in the living room or the family room. Try to stay away from the dining room or kitchen. The living room is less likely to have distractions. If there is a TV, if at all possible, in a friendly manner, request that it be turned off, so you can talk without interruptions. While in the interests of time lost, and realizing that some members of the Masonic Investigative Committee may disagree with me, it is my firm belief that if the petitioner will not turn the TV off, he is not truly ready to be interviewed and another appointment should be set, rather than trying to out-shout a political debate, a football game, Dr. Phil, Oprah, etc. If you do not, everyone loses.

Roles of Each Member of the Masonic Investigative Committee

Always have three members of the Masonic Investigative Committee present for the interview with the petitioner.

Chairman's Duties: The chairman of the Masonic Investigative Committee should assume the leadership role in the interview and should ask the major portion of the questions.

The Masonic Investigative Committee Chairman should control the time spent on the interview and should not overstay the committee's welcome. He should be aware of any signs of restlessness on the part of any of the participants and, should the interview become lengthy, he should take steps to bring it to a smooth and natural conclusion.

The chairman should poll his committee prior to closing by asking, in an offhand manner, if he has neglected to mention anything important and/or ask if anyone has a final comment he would like to make or a final question he would like to ask.

Very Important: (see Brother # 3, below) This will give the third member of the committee a natural opportunity to address any problems he has observed, if he has not had an opportunity to do so up to that point.

The petitioner and his wife should be asked if they have any final questions or observations they would like to make before the committee departs in order to consider their recommendations on the petition.

Brother # 2: The second man on the committee should join in answering any questions the petitioner or his wife might have, watch the petitioner for his reactions to questions, and basically act as a resource person.

Brother # 3: The third man on the committee should spend the majority of his efforts observing the reactions of the petitioner's wife and any other members of the family that may be present. This man should pay particular attention to the wife and take special care that she does not feel left out of the conversation in any way. She is the key to her husband's retention in the Masonic Fraternity.

Petitioner's Wife: Observe the Petitioner's wife or partner, closely for her reactions to questions and to the general conversation and make careful mental notes of her reactions. At appropriate pauses in the flow of the interview, attempt to address any concerns she might have that have become evident by her responses or reactions and by her body language.

While it is unlikely that she will verbally object to her husband's interest in the fraternity in front of the committee, she may very likely show her feelings strongly by her nonverbal reactions. This is the time to address her concerns and/or reservations.

Do not wait until her husband has spent both money and time with the Fraternity before finding out that her opinions and feelings were negatively and irreversibly set during the initial investigation. Remember, just as you are there to judge her, she is judging you.

Adverse Reactions: If the petitioner or his wife displays adverse reactions at any time during the interview, gently find out the reason for their negativity. Their negativity probably has absolutely nothing to do with you or your Masonic Investigative Committee.

There are many misconceptions about Freemasonry that abound in whispers, on the internet and in other places. She or he may have heard about Evil Masonic Mysteries, Pentagrams instead of Solomon's Seal, that Masons sacrifice animals in their secret rituals or believe that Masons are attempting to create some sort of New World Order (pretty hard to do when there isn't even a national Grand Lodge headquarters in the United States!). Even so, she doesn't know any of that. She may have even heard that her husband would have to ride a goat through the streets.

It is your job to truthfully tell her what Masonry is about and allay her fears. The committee needs to explore these adverse topic(s) and fears in greater depth. The best way to shed light upon the subject may well be to explain the role that the Bible (or other holy book such as the Koran, Torah, etc.) have, as well as the reason that each member must believe in a Supreme Being, within Masonry.

It is the job of the Masonic Investigative Committee to be well versed in Masonic knowledge and the history of Freemasonry to correctly impart a true knowledge of Freemasonry and reassure the petitioner (and his wife) of the support, friendship and brotherhood the lodge extends to its members.

Concordant Bodies: No interview should be complete without mentioning the many concordant bodies such as Eastern Star and the Order of the Amaranth (for both men and women), Order of the Rainbow and Job's Daughters (for girls 10-21), and DeMolay (for boys 12-21). Each of these concordant bodies provides fellowship for all members of the family.

Handshake: Each member of the Masonic Investigative Committee should extend the right hand of friendship to the petitioner and his family prior to departing from their home. A firm, warm and friendly grip is the one form of body language, when used in conjunction with a sincere smile, which overcomes reservations and encourages positive relationships.

Informational Materials: It is recommended that a Welcome packet, if available, containing information and brochures for the Petitioner, his spouse or partner, and his family about Freemasonry, its appendant bodies, and the Lodge should be left with the petitioner following the interview.

Masonic Investigative Committee Checklist:

Important points on which you will wish to check off include:

1. Defect/Deformity:

Ascertain definitely if the petitioner has any defect or deformity which will prevent him from being instructed in the arts and mysteries of Freemasonry, or cause an inability to acquire the means of subsistence.

2. Jurisdiction:

Ascertain definitely if the Lodge has jurisdiction over the petitioner. Determine also if he is a legal resident and has been so for at least six months in this jurisdiction.

3. Mentally Qualified:

Ascertain whether the petitioner is mentally qualified to receive Masonic Degrees.

4. Morally Fit:

Ascertain whether the petitioner is morally fit to be received into the Fraternity. One way to perform this task is to check the Sex Offender sites which are on the internet. There are many good sex offender search sites, (many are owned by governmental bodies). Some of these websites even place photos of the offenders onto their pages.

As of April 2009, it is a requirement of the Grand Lodge of Wisconsin that a check of the Wisconsin Online Circuit Court Database at <http://wcca.wicourts.gov/index.xsl> be completed. The results must be printed and attached to the petition PRIOR to the investigation meeting with the petitioner. Be sure to ignore any records for traffic violations or cases where the petitioner was deemed innocent or not guilty for any reason. Other identified concerns should be addressed during the meeting with the petitioner. Take care to determine that the record truly belongs to the petitioner and not a man of similar name. See the Master or Secretary with any questions on how to conduct this activity or if it is not completed before the interview.

5. Impaired Usefulness:

Ascertain if any organization to which he belongs will impair his usefulness to the Fraternity. Are those organizations anti-social or negative in nature?

6. Character:

It is permitted to request a list of personal character references as part of the petition process. If references were provided, check them and ascertain if his neighbors, acquaintances and employers give him a good character. There is no Code entry prohibiting this action.

7. Questionnaire Completion:

Check his answers to the questionnaire attached to his petition to see that they have been fully answered. If any questions have not been answered, interview the petitioner and request their completion, or ascertain the reason for his not answering such questions. If any answers appear to be incomplete or misinterpreted when provided, obtain the full and correct information. In particular, pay attention to contact information such as phone and email address and to family information such as spouse and birthday.

8. Financial Standing:

Consider the financial standing of the petitioner with particular reference as to his reputation in meeting his obligations, and whether or not the maintenance of Lodge membership in any way may be a financial detriment to those dependent upon him. It is permitted by Masonic Code to conduct a credit check of petitioners if desired and authorized by the Lodge (70.01 Annotations).

9. Recommendation:

No member of the Masonic Investigative Committee should make a favorable recommendation unless they are truly convinced that the petitioner will conform to the laws, rules and regulations of the Masonic institution in all ways.