



## DISTRICT DEPUTY GRAND MASTER LODGE VISITATION CHECKLIST

The Worshipful Master and Lodge officers are encouraged to view meeting with the DDGM as an opportunity to ensure that their particular Lodge is complying with the rules and regulations of the Grand Lodge of Florida, to which they have obligated their compliance to Masonic Law. The DDGM stands ready to assist any Lodge in the performance of their duties. The following checklist is a guide to ensure that all critical areas of the Lodge operations are being implemented. The use of a filing systems ensures that each Lodge not only has a historical record of its activities, but that future leaders will have a source of records upon which they can continue to build a more prosperous and successfully functional Lodge.

**PLEASE PRINT OR TYPE**

Lodge Name & Number: \_\_\_\_\_ Zone: \_\_\_\_\_ District: \_\_\_\_\_

DDGM's Name: \_\_\_\_\_ Date of visit \_\_\_\_\_

Name of Lodge Officers:

W.: M.: \_\_\_\_\_

S.: W.: \_\_\_\_\_

J.: W.: \_\_\_\_\_

TREAS.: \_\_\_\_\_

SEC.: \_\_\_\_\_

Regular Members _____	<b>TOTAL</b>
Emeritus Members _____	
Dual Members _____	
Plural Members _____	
Initiated _____	
Affiliations _____	
Transfers In _____ Out _____	
Dimits _____	
Reinstatements NPD'S _____	

### I. CHECKING THE MINUTES BINDER

Y	N	1. Are minute's books permanently bound after 250 pgs. Check previous years. Reg. 25.32
Y	N	2. Opening Annual Lodge of Sorrow (Funeral) and Closing at the end of year Reg. 25.12
Y	N	3. Funeral Services conducted if yes, how many _____?
Y	N	4. Are the Funeral Services recorded in minutes Reg. 25.12
Y	N	5. Charity discussion at every meeting and recorded in minutes Reg. 24.05 UCB 10.08 (1)
Y	N	6. Charity Program announced in Trestle Board if one is published Reg. 24.05 UCB 10.08 (2)
Y	N	7. Masonic Education activity recorded monthly in the minutes for Stated Communications
Y	N	8. Finance Committee year-end report in the minutes of January, no later than Feb. UCB 10.02
Y	N	9. Treasurer's report attached to minutes when required by the craft to given monthly, quarterly UCB 6.06
Y	N	10. Mentors report recorded to comply with Reg. 37.18
Y	N	11. Notification of Candidates to other Lodges with concurrent Jurisdictions as per Reg. 18.01
Y	N	12. Income received at meetings recorded in the minutes
Y	N	13. Are bills presented to the Lodge and amount recorded in the minutes
Y	N	14. Does Lodge investigate, approve and certify Emeritus Members as per Reg. 25.05 UCB3.05, 26.08 & 30.06



## DISTRICT DEPUTY GRAND MASTER LODGE VISITATION CHECKLIST

<b>II. CHECKING THE FINANCIAL PROCEDURES</b>		
Y	N	1. Is there a voucher/warrant system in place for monies received and transferred from Secretary to Treasurer
Y	N	2. Is there a warrant system in place from Secretary to Treasurer authorizing payment of expenses
Y	N	3. Treasurer's Report must detail receipts and from where and recorded.
Y	N	4. Expenses paid and amount must be detailed in the Treasurer Records
Y	N	5. Charity Fund is a separate account UCB 11.01
Y	N	6. Treasurer's files contain records of bank statements and reconciliation reports
Y	N	7. Annual Report of Treasurer & Secretary attached to January minutes but not later than March UCB 6.06
Y	N	8. Sales Tax payments to Florida Department of Revenue completed on time
Y	N	9. Registration with Department of Agriculture to comply with fundraising laws
Y	N	10. LYPMGC Quarterly Reports submitted to Grand Lodge in a timely basis and filed in Lodge Records
11. Date From 990EZ mailed to IRS and <b>copy sent to Grand Lodge</b> (____/____/____) & (____/____/____)		
12. Dates Property Appraisal Tax Exemption Form filed and notified Grand Lodge (____/____/____) & (____/____/____)		
13. Do you Own _____ Rent _____ or Lease _____		

<b>III. NOTIFICATION TO ALLIED AND APPENDANT ORDERS</b>		
Y	N	Are Allied and Appendant Bodies notified of NPD's, and Death
Y	N	Does Secretary records in the Brothers Records the various affiliations with the other Bodies (it is recommended)

<b>IV. INSURANCE AND OTHER AGREEMENTS</b>		
Y	N	1. Certificate of Liability Insurance Binder (required by Grand Lodge)
Y	N	2. Is there a Rental Agreement on file per every renter
Y	N	3. Release, Hold Harmless and Waiver of Liability Agreement
Y	N	4. Certificate of Liability Insurance Binder per group that meets in Lodge Property (required by Grand Lodge)
Y	N	5. Names of groups using the facility.

<b>V. MASONIC EDUCATION</b>		
Y	N	1. Is the Lodge System of Masonic Education fully implemented UCB 10.05 & Regulation 37.12 & 37.18
Y	N	2. Is there a Lodge Mentor appointed and is the mentoring system in place UCB 10.05 1-5
Y	N	3. Is Masonic Educations conducted at least once a month at a Stated Communication



## DISTRICT DEPUTY GRAND MASTER LODGE VISITATION CHECKLIST

<b>VI. OTHER LODGE DUTIES, REQUIREMENTS &amp; PRACTICES</b>											
Y	N	1.	Does the Lodge maintain a Roll of Members signed by all the members UCB 3.06								
Y	N	2.	Are the member provided a copy of the By-Laws Article X Section 14 Const. (Digest of Masonic Law of Florida)								
Y	N	3.	Are geographical jurisdictions obtain when necessary								
Y	N	4.	Check that required time is being met in all petitions and affiliations (See annual returns for verifications)								
Y	N	5.	Are investigation Committees named and performing their work								
Y	N	6.	Match Background Investigations receipt with Petitions for Initiation, Affiliation and Reinstatements								
Y	N	7.	Does the Lodge conduct regular Ritual Practices for Degrees. How often _____								
Y	N	8.	Does the Lodge have a Catechism Instructor other than the Mentor								
Y	N	9.	Does the Lodge conduct Catechism Instructions								
Y	N	10.	Does the Lodge conduct Lodge Officers Education								
Y	N	11.	Are Masonic Service Awards presented in a timely manner, if not why?								
Y	N	12.	Were Public Relations and Publicity Committee goals achieved? Why not?								
Y	N	13.	Were Public Education and Citizenship Committee goals achieved? Why not?								
Y	N	14.	Does your Lodge conduct a Widow's Program, if not why?				15.	Presents Widows with Pin & Certificate		Y	N
Y	N	16.	Are Family Programs conducted? If yes circle activities below, if not why not?								
Americanism, Youth Nights, Past Master's Night, Volunteer Recognitions, Patriotic Events, Dinners, Others _____											
Y	N	17.	Does your Lodge support any Youth Programs? If yes circle activities below, if not why not?								
Rainbow for Girls, Job's Daughters, DeMolay, Boy Scouts, Girls Scouts, Little League, School Band or Sports, Others _____											
Y	N	18.	Does your Lodge support the Masonic Youth Association of Florida								
<b>VII. LODGE PARTICIPATION</b>											
Do the Lodge Officers attend:											
Y	N	<b>1. Masters &amp; Wardens or Master Masons Associations (if yes how often)</b>									
Y	N	2.	Worshipful	Master,	how	Y	N	3.	Senior Warden, how many _____?		
			many _____?								
Y	N	4.	Junior Warden, how many _____?	Y	N	5.	Senior Deacon, how many _____?				
Y	N	6.	Junior Deacon, how many _____?	Y	N	7.	Others, how many _____?				
Y	N	<b>8. Ritual Schools of Instructions (if yes how often)</b>									
Y	N	9.	Worshipful	Master,	how	Y	N	10.	Senior Warden, how many _____?		
			many _____?								
Y	N	11.	Junior Warden, how many _____?	Y	N	12.	Senior Deacon, how many _____?				
Y	N	13.	Junior Deacon, how many _____?	Y	N	14.	Others, how many _____?				



## DISTRICT DEPUTY GRAND MASTER LODGE VISITATION CHECKLIST

Y	N	<b>15. Masonic Leadership Training (if yes how often)</b>			
Y	N	16. Worshipful Master, how many _____ ?	Y	N	17. Senior Warden, how many _____ ?
Y	N	18. Junior Warden, how many _____ ?	Y	N	19. Senior Deacon, how many _____ ?
Y	N	20. Junior Deacon, how many _____ ?	Y	N	21. Others, how many _____ ?

### VIII. LODGE COMMITTEES

Y	N	1. Finance Committee Reg. 24.05 UCB 10.02 Senior Warden Chairman
Y	N	2. Vigilance Committee Reg. 24.05 UCB 10.03 Junior Warden Chairman
Y	N	3. Petitions Committee Reg. 24.05 UCB 10.04 & Reg. 33.08 Chairman appointed by Worshipful Master
Y	N	4. Masonic Education Reg. 24.05 UCB 10.05 Reg. 37.12 & 37.18
Y	N	5. Board of Relief Reg. 24.05 UCB 10.06 Worshipful Masters & Wardens
Y	N	6. Investigations Committee Reg. 24.05 UCB 10.07 Appointed by Worshipful Master per instance as needed
Y	N	7. Charity Committee Reg. 24.05 UCB 10.08 Appointed by the Worshipful Master
Y	N	8. Lodge Property Committee Reg. 24.05 UCB 10.09 Appointed by the Worshipful Master

### IX. TRESTLE BOARD

**Does the Trestle Board contain the following information:**

Y	N	1. Published monthly if not how often? _____													
Y	N	2. Lodge Officer’s contact information				Y	N	3. Committee contact information							
Y	N	4. Names of Petitions in Petitions and Investigating Committees													
Y	N	5. Names of Candidates awaiting Degrees													
Y	N	6. Charity of the month UCB 10.08													
Y	N	7. List of Sickness and Distress, and Deaths													
Y	N	8. List of Past Masters				Y	N	9. List of Perpetual Members							
Y	N	10. List of Trestle Board Boosters				Y	N	11. List of Birthdays, birth and/or Masonic							
Y	N	12. Lodge Calendar dates and times		Y	N	13. Degrees		Y	N	14. District Events		Y	N	15. DDGM Visit	

### X. LODGE BUILDINGS

Y	N	1. Is building painted and in good appearance	Y	N	2. Landscaping maintained
Y	N	3. Interior clean and without clutter	Y	N	4. Preparation room clean and uncluttered
Y	N	5. Does Lodge building conform with neighborhood	Y	N	6. Is Lodge building being used for charitable purposes
Y	N	7. Emergency Contacts up to date and posted on front door			



## DISTRICT DEPUTY GRAND MASTER LODGE VISITATION CHECKLIST

XI. DDGM VISIT TO THE LODGE									
Y	N	1. Worshipful Master present	Y	N	2. Senior Warden present	Y	N	3. Junior Warden present	
Y	N	4. Treasurer present	Y	N	5. Secretary present	Y	N	6. Senior Deacon present	
Y	N	7. Junior Deacon present	Y	N	8. Marshal present	Y	N	9. Others, how many? _____	

XII. GRAND MASTERS VISIT TO THE DISTRICT									
Y	N	1. Worshipful Master present	Y	N	2. Senior Warden present	Y	N	3. Junior Warden present	
Y	N	4. Treasurer present	Y	N	5. Secretary present	Y	N	6. Senior Deacon present	
Y	N	7. Junior Deacon present	Y	N	8. Others how many? _____				

XIII. GRAND LODGE COMMUNICATION ATTENDANCE									
Y	N	1. Was Lodge represented at the last Annual Communication							
Y	N	2. Worshipful Master or Proxy	Y	N	3. Senior Warden or Proxy	Y	N	4. Junior Warden or Proxy	
Y	N	5. Any other Officers how many? _____	Y	N	6. Past Masters how many? _____	Y	N	7. Other Members, how many? _____	
Y	N	8. Has any Lodge member or three principal Officers attended Board of Trustees meeting at the Masonic Home in the past 3 yrs.							
Y	N	9. Has any Lodge member ever attended the Masonic Home Pilgrimage in the past 3 yrs.							

This report shall be sent to the Grand Master no later than five working days after your visit to the Lodge. With the reasons why they are not being implemented and the plans from the Master on when and how it will be implemented in the future. Use additional paper as needed and enumerate reasons with the same number as in the subject being discuss for clarification.

**MOST IMPORTANT:** This is intended to be able to provide the Lodges with the assistance necessary to implement the requirements mandated by the Digest of Masonic Law of Florida and other Programs adopted by Grand Lodge.

COMMENTS: