

# Guidelines for Candidate Investigation Committees

Grand Lodge of South Dakota  
Ancient Free and Accepted Masons



Developed by the Commission on Masonic Education

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### *The task:*

Section 4-61 of the By-Laws of the Grand Lodge of South Dakota states the following as the duties of committees on investigation of candidates:

*“Every petition for the Degrees shall be referred to a committee on investigation, appointed by the Master, consisting of three members of the Lodge, who shall diligently inquire into the moral, mental, and physical qualifications of the applicant, and examine him and ascertain whether he is and has been an actual resident within the jurisdiction of South Dakota for six months immediately preceding the presentation of his petition, and not disqualified by Section 4-59, and report thereon.”*

Being appointed by the Master of the Lodge to a Candidate Investigation Committee is among the most important duties a Mason can perform for his Lodge, the Grand Lodge, and for the fraternity as a whole. The Lodge is dependent on the committee to make a wise decision as to the appropriateness of the candidate for admission. To quote P.G.M. Donald J. Flood of the Grand Lodge of Minnesota: *“The non-Masons who know us will judge each of us, and Masonry itself, by the way in which we conduct ourselves. We have in trust the reputation of Masonry.”*

In addition to examining the “moral, mental, and physical qualifications of the candidate,” there are many other facets of the individual which need to be uncovered. The examination needs to look at these other important

characteristics. There are men who easily qualify as morally, mentally, and physically sound individuals, but for other reasons are not appropriate candidates for Masonry. This includes men who either lack the support of their wives and family in this endeavor, who belong to church denominations hostile to Masonry, or who are unwilling to commit the time needed to comprehend the lessons of Masonry and embrace our philosophy. We all know men in this category - good men. Not only do we do a great disservice to our Lodges by admitting these men, but we also do a disservice to those men. Therefore, a proper investigation committee looks out for the best interest of the fraternity and the potential candidate.

### *The process:*

Every petition shall be recommended by two members of the Lodge and be presented at either a Stated or Special Communication (Sec. 4-60) and read to the brethren. Members of the Lodge who have recommended the applicant must not be appointed to the Investigation Committee (Sec. 4-64). Following completion of the investigation of the candidate and a favorable report, the petition shall be read a second time at a Stated Communication only (Sec. 4-95) and a ballot taken. The ballot cannot be taken less than two weeks following referral of the petition to the Investigation Committee (Sec. 4-96). If the Committee finds the applicant disqualified for whatever reason, they shall make a report to the Master of the Lodge who may order the ballot withdrawn (Sec. 4-62). “No one may demand of the

Committee or any member thereof the reasons for the report and conclusions of the committee or the facts on which the same were based (Sec. 4-64).” Membership qualifications are covered in detail in Sec. 4-56 through 4-81 of the Grand Lodge By-Laws.

Of the three members of the Investigation Committee, one shall be appointed to serve as the Chair. It is his responsibility to contact the candidate and schedule a visit with the committee. All committee members must meet with the candidate, either as a group or individually. If a Committee member is not present for the reading of the petition in Lodge, he should contact the Lodge secretary so he can read it. It is important to complete the investigation prior to the next Lodge Stated Communication so as to not delay the progression of the petition. Under no circumstances shall any member of the Investigation Committee sign off on a petition without meeting with the candidate and assuring himself that the candidate is suitable for initiation. If any member of the Investigation Committee is unable to complete his responsibility in a timely manner, the Master of the Lodge should be informed immediately and a replacement named. Dragging on of the process reflects poorly on the Lodge and is a disservice to the candidate.

The Grand Lodge of South Dakota permits acceptance of recommendations of candidates under a proclamation of the Grand Master. This procedure, also known as the “pre-approval process,” allows voting on potential candidates prior to formal submission of a Petition for the Degrees of Masonry. In these instances, it is particularly important that the proposers of the

candidate be completely satisfied as to the appropriateness of the individual and that satisfactory answers to questions from a “regular” investigation would have been forthcoming.

### *Before the visit:*

The Investigation Committee might be more accurately termed a “Visitation Committee.” While the same information is collected, the use of the term: Investigation Committee appears to some to imply that the candidate may have done something wrong! This is far from the image we wish to portray to the candidate and his family.

A good first step in the process is to talk with the brothers that recommended the candidate. After all, they should have a feel for how suitable the candidate is for membership. Ask about the candidate’s reputation within the community, his profession, church, etc. Assure yourself that the brothers who made the recommendation are certain of the appropriateness of the candidate. Ask why they signed the petition. Was it simply because they were asked to sign it? What is their relationship with the candidate and how well do they really know him. This is also a good opportunity to learn more of the personal background of the candidate above and beyond what was indicated in the petition.

## *The visit:*

There is much to be said for conducting the interview in the candidate's home in the presence of his wife and family. Households that operate on the "chaotic" side probably would not be an appropriate setting for this visit. Every situation will be different, but an interview in the home may give the committee a better feel for the candidate's home life, including what his wife thinks about this new "adventure" her husband is undertaking. At any rate, it is critical that the wife is supportive of her husband's wish to become a Mason including the time required, expense of joining, and membership dues. She certainly should be encouraged to participate in the visit. The committee can do much to ease her mind that this is a very positive decision for her husband and the family. Additionally, this is a good time to talk about the family-oriented activities of the Lodge and to make her aware of the Order of the Eastern Star and the location of the local chapter. Most Lodges probably have dinners, picnics and special programs which include the families. Anyone who is expected to give of his time and money to a fraternal organization must have the support of his wife and family. Any man who is "squeezed" between two commitments, especially if one is to his family, will solve the problem by negating one of the commitments and it is likely to be the fraternity. The new member is an investment in which the Lodge puts a lot of time and effort into their development. So, if it is clear early on that the candidate

will not be a committed member, does your Lodge want to make this investment?

Dress appropriately for the visit - not overdressed and not underdressed. Make it obvious to the candidate and his family that you wish to make a good impression. This will send a subtle message that the Lodge brothers are proud of their fraternity and are particular about who will join them. The committee will also be observed by the petitioner and his family who will consider them as representatives of Masons in all respects.

A good starting point is to enquire as to what led the candidate to seek admission into the fraternity. Is there a family history of Masonic membership? Are there men who have made a favorable impression on him who are (or were) Masons? What does the candidate believe Masonry is about? Not all men are clear on this point and it is important that he and his family understand what Masonry is and what principles it stands for. Although it is said that no one man can speak for the fraternity, share with them your feelings as to what the fraternity stands for and why you enjoy the brotherhood. Reassure the petitioner of the support, friendship, and brotherhood the Lodge extends to their members.

Although it may seem awkward at the time, it is important that the candidate be directly questioned as to any previous criminal convictions. This subject is much too important to be left to assumption and needs to be addressed in the report to the Master of the Lodge.

Among the misconceptions of the fraternity by some is that it is some sort of an insurance society. It is important that the petitioner understand that he will not be

paid benefits in case of unemployment, sickness, accident or death. This is particularly important with those candidates who are financially “on the edge.” Explain that Masonry is not interested in the political or religious beliefs of their members, but require a belief in a Supreme Being and loyalty to the government and country.

The committee should also inquire as to what other organizations the petitioner belongs to and what special outside interests and vocational expertise they might have. It is quite possible that the Lodge may be a good place for him to exercise these skills. For instance, it is quite likely that any Lodge would love to initiate a good candidate who is also a chef or a carpenter, plumber, musician, or bookkeeper.

In some cases a candidate is already well-known to at least several members of the Lodge. In other instances, petitions come in from men who are unknown to the Lodge members. The completed petition includes contact information for “several persons now living, who were friends, neighbors, associates or employers.” Perhaps these individuals may need to be contacted to gather further information about the candidate. In some cases the candidate may be an associate of one of the committee member’s acquaintances and a reference may be secured in this way. Never-the-less, if there is any question in the mind of any committee member whether the candidate is suitable for membership, the references should be visited with.

The chairman should serve as the moderator of the visit and assure himself that all questions have been asked and no one has anything to add. Be particularly aware of

the directness and sincerity of his answers. Is there a lot of fidgeting going on?

Questions should be asked to satisfy you as to whether the candidate is charitable, believes in a Supreme Being, is of good sound character, and is one who will adopt the philosophy of Masonry. If there are any questions about the candidate’s responses to questions on the petition, these need to be addressed as well.

In closing, ask if the petitioner or his wife have any final questions. Explain the next steps in the process and when he should expect to hear back from the Lodge. However, be careful not to give the petitioner the impression that he will certainly be elected to membership.

### *The report:*

Following the interview, the committee members need to come to a consensus as to the suitability of the candidate and write a report with their findings. If, however, there is a difference in opinion as to the appropriateness of the candidate for membership, this needs to be explained as well. The report will then be given to the Master of the Lodge for his decision. He will then decide whether the petition goes to the Lodge for the second reading and ballot. Reports on petitions approved by the Master will be read by a committee member in Lodge prior to balloting. Any questions and comments from the members may be fielded at that time. Following this, the Master of the Lodge will call for a ballot to be taken on the candidate.

## *Acknowledgements:*

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## *Notes:*