

# Suggested Guidelines for Investigating a Lodge Petition



Grand Lodge, AF&AM  
of the State of Oklahoma

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## Guarding *Our* West Gate

Section U 405 of the Oklahoma Constitution and Code provides guidance for the duties of the Investigating Committee, but offers little in regards to what should be done specifically by this group.

This guide is provided as a ready reference for all lodge investigating committee members for suggested methods of conducting a petition investigation. Part of the content is based on guidelines provided by the Grand Lodge of Texas, but modified for Oklahoma use.

No Mason could be charged with a higher or more noble and rewarding responsibility than being charged with the responsibility to be a guard at the entrance gate of the Temple. An investigation of a Petitioner consists of a great deal more than a casual interview or a couple of hurried calls to the Petitioner's references on the day that the investigation report is due. It is human nature that a Petitioner will give as references those who are most likely to give him a good reference. What every Lodge needs is a group of men who will not only consider the statements of the Petitioner, but will go beyond those statements to determine the true character of the man.

A proper investigation of a Petitioner is especially important today when, in most cases, few of the Brethren who will vote on his petition actually know the Petitioner, and therefore depend entirely on the report of the Investigating Committee to decide how they will vote.

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. It is, therefore, your solemn duty to perform a conscientious check upon the candidate before coming before the lodge, heeding the message found in Section U402 of the Oklahoma Grand Lodge Constitution and Code concerning the qualifications of candidates, wherein it states that candidates for the degrees of Masonry must be "of good moral character".

## The Investigating Committee

Our Lodges should make a special effort to select a group of its members that have been chosen on the basis of experience, wisdom, discretion and knowledge. Each member should be a **willing volunteer** to ensure the job is done correctly and that Masonry, *and the man*, are better off for his joining.

### A Petition Review

After the Worshipful Master has appointed the members of an Investigation Committee, they should coordinate with the Secretary of the Lodge and call a meeting of the Committee at the Lodge. Ask the Secretary to provide a copy of the petition for each member of the Committee in order that they can carefully go over the petition itself. ***The Secretary should have asked for some form of identification when the petition was presented.*** The Petition is loaded with good information for the Committee to use during the investigation. The Committee should review each question and each answer on petition checking for date gaps and inconsistencies, all the while making a list of items to be checked and questions to ask the petitioner.

At this point, members of the Committee should be assigned certain lines of inquiry to be carried out, such as:

- Criminal Records
- Contact each reference listed by Petitioner
- Contact Petitioner's past and present employers
- A Petitioner's Signers
  - Contact Petitioner's listed Masonic signers

After the background, reference and petition signer inquiries of the investigation have been completed, the Committee should meet again to compare their findings and discuss how the findings will play into their interviews with the Petitioner.

## A Background Check

Many Grand lodges are making it mandatory to conduct a criminal background check for the degrees and out-of-state affiliations. These checks are usually done through third party contractors. Some require the individual petitioning a lodge to register, provide credit card payment and submit information. The background check is then sent to that individual and either the Grand Lodge or local lodge.

**RECORD OF FORMER RESIDENCE:** In our changing society nowadays, many young men are not as likely to seek education or employment where they grew up. Even so, the diligent investigator can gain a lot of information about a man, particularly if he came from a small community. Some of his family may belong to a Lodge. A simple call to either the Secretary or other member of the Lodge might prove beneficial to the investigation. Seek, and you just might gain some valuable information about the Petitioner - and valuable information might well be to the credit of the Petitioner.

When checking on out-of-state references or former addresses regarding a petitioner, you also may want to search for that state's criminal background check web site so you can run a background check on the petitioner where they may have resided recently .

**WORKPLACE:** Each petitioner is required to list their previous employer(s) for the last three years. You may want to contact the petitioner's prior employers. Although some employers are guarded about giving out information regarding past employees, it is always worth the effort to try. At the very least, have the employer verify the information reported on the petition.

## References

Petitioners should provide five references. Suggest to the petitioner when he is given his petition that he list any Masons he may know. *Masonic* references can be the best source for obtaining valuable information about the petitioner and because they are Masons, the investigator should be able to explore all areas of the petitioner's background without having to tread lightly. These individuals must **KNOW** the petitioner.

Call and talk to each one of the references listed on the petition. Ask them specifically about the Petitioner's character, both good and bad. A man who is worthy to be a Mason should possess character traits that are well known to all, more especially a reference who is a Mason.

Don't overlook any reference - the last one you check just may be the one that is needed by the Committee.

## Mason Petition signers

Ask the Masonic petition signer if he knows the petitioner to be of high moral character that would make him worthy and well qualified to be a Mason.

### **SUMMARY: Important Questions to be asked before meeting with the Petitioner**

- Does he have a criminal history?
- Are there any criminal warrants or charges pending?
- Do his coworkers know him to be a good man?
- Does he pay his bills on time and meet his obligations?
- What information is on the Internet about him? (Google search/ Facebook page)
- Do his civic and social activities show him to be a good man?

## Interviewing the Petitioner

The members of the Investigating Committee should visit the Petitioner in his home. Then, the Committee should have a final meeting and make a decision with regard to the report of the Committee - favorable, or unfavorable.

The investigators should not just concentrate on finding out what is wrong with the Petitioner. While such information is important, of equal importance is to find out what is RIGHT about him. Remember, most men have distinguished themselves in activities such as church, family, business, civic and public life. **LOOK FOR THE GOOD THINGS.**

A lot of good men have made mistakes in the days of their youth, corrected their mistakes and go on in adult life to make good husbands, fathers, and citizens, and will doubtless make good Masons. Skilled and interested investigators can be counted on to take these and many other points into consideration.

## Areas to Explore During the Interview

❖ **FAMILY LIFE:** Is he a good husband, father and provider for his family? Is he kind and gentle with his wife? Does he guide his children by example, provide for their education, and share in their activities as a family? What is the attitude of the family regarding the Petitioner becoming a Mason?

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❖ **FINANCIAL RESPONSIBILITY:** There are many restrictions in this area of investigation. The best approach would be to point blank the question: "***Are you aware that some financial responsibilities attached to membership in the Masonic Fraternity ?***" It then would be appropriate to explain that *such responsibilities include the initial Degree Fees and then on an annual basis is the matter of Lodge Dues.* Tell him what will be expected for the Degree Fees, and tell him what the annual dues in the Lodge are. Explain to the Petitioner that the Lodge - indeed the entire Fraternity - have a moral and spiritual investment in each of its

members and we simply must investigate matters such as financial responsibility of Petitioners. Then ask the simple question: *"Is there anything in the area of our financial dealings that are a matter of public record that you feel would be appropriate for us to discuss at this time?"* Let him talk. Listen to what he says! In many instances you can learn a lot by simply listening.

❖ **CRIMINAL CHARGES** : If the Petitioner has indicated on his petition that he has had previous brushes with either civil or criminal charges, talk with him about it and don't prejudge the circumstances. In many instances the matter can be cleared up to the satisfaction of the investigator. If the petition indicates there has been a problem in the past, encourage a discussion about the matter.

❖ **CIVIC ACTIVITIES:** Is he interested in Public Schools, in the School Board, in City or County government? Does he serve on any local committees or boards? Is he registered to vote, and does he exercise the privilege to do so? There is a vast amount of information to be gleaned from his response to such questions.

❖ **CHURCH MEMBERSHIP AND ACTIVITIES:** You should first assure the Petitioner that Freemasonry only requires that a man express a belief in a Supreme Being. Beyond that, the matter of worship or membership in organized religion is a matter to be determined by each individual. Even so, a Petitioner should not be offended if asked the question: *"Do you belong to a church?"* Ask simple questions and **LISTEN** to what he says. You can gain a lot about a man's character in such a manner.

❖ **OCCUPATION:** Many candidates are initiated into our Fraternity and then do not advance because they did not fully understand what they were getting into as far as the time commitment is concerned. Inform the Petitioner about the time that will be required to for him to devote to instruction during the Degree learning process and for attending Lodge. Ask him if his work and/or personal schedule will allow him the time required. Do not



accept a simple yes answer, ask directly *"Are willing and able to commit the time that is necessary to learn the required lessons and to attend lodge on a regular basis?"*

❖ **BUSINESS REPUTATION:** Ask him to tell you about his job. If he is self-employed, ask him how his competitors feel about his business ethics? Based upon his reaction to your questions, do you feel like he is honest in his dealings with others?

If he works for others, ask him what he believes would be the honest appraisal of his performance as an employee. Ask him what he believes co-workers might say about him. Ask him if he honestly feels that he gives a full day's work for a full day's pay. Will his occupation permit him the time necessary to learn the work and then to attend regular meetings?

**LISTEN and LEARN!**

❖ **EDUCATION & TRAINING:** Have the petitioner tell you about his formal education and any special training and make note of any special skills that he might have. Ask him if he has any degrees or certifications.

❖ **ARMED FORCES RECORD:** Ask the Petitioner if he has ever served as a member of the Armed Forces. If he has, ask if he would mind showing you his discharge papers. All discharges are **NOT HONORABLE!** If there is a problem, ask him to explain the circumstances to your satisfaction.

❖ **ORGANIZATIONS BELONGED TO:** Find out what kind of organizations he has joined - if any. If he has been a "joiner", ask for an explanation of the objectives of the organization(s). Some organizations have a reputation of dealing with violence, not only physical violence, but violence to the rights of others, while some are subversive in character. Many times a careful inquiry along these lines will tell you much about a man's character, and should not be disregarded nor considered as radical.

❖ **RECREATION & HOBBIES:** Ask him if he has any hobbies and ask him what he does with

spare time for recreation.

❖ **FRIENDS & NEIGHBORS:** Ask him if he has any friends or neighbors that you can contact who can vouch for his character. Are any of them Masons?

❖ **REASON FOR PETITIONING:** Now, the investigation is getting down to the nitty-gritty! What is the Petitioner's motive to become a Mason? Point blank ask him - Why do you want to become a Mason. Ask him what attracted him to the Fraternity. Ask him if he has or if his wife has relatives who are Masons.

Does he think that being a Mason will help him in business, or socially or even politically? Does he want to be a Master Mason as a stepping-stone to other branches of Masonry? If married, has his wife pushed him into petitioning because she wants to join some Masonic related organization requiring that he be a Mason? Engage the Petitioner in conversation on this subject. **LISTEN!** A lot can be learned about the Petitioner when it comes to his reason for petitioning.

Find out the Petitioner will be able to devote the necessary time to learn the degree work and then to attend lodge meetings on a regular basis. Be straight forward with information about the amount of time this is required to really be a Mason. He and his lady must fully understand the time commitment involved when a man decides to become a Mason.

## **A Committee Review**

At this point the Committee Chairman should call a meeting of the Committee to review all of the findings of the investigation, discuss the various aspects of the investigation. At this point each Committee member should have enough information to make his own individual decision regarding the Petitioner, whether favorable or unfavorable. If there is any doubt on the part of any of the Committee member as to his recommendation, the Chairman should have the Committee work to resolve any lingering issues.

Before making a final decision regarding the Petitioner, each Committee member should ask himself the following questions:

❖ **Is this man truly "Worthy and Well Qualified"?**

❖ **Would I welcome this man into my home?**

❖ **Would I want this man to marry my daughter?**

❖ **Would I trust my life to this man?**

❖ **Will this man be a credit to the Fraternity?**

❖ **Is this man sufficiently literate to be able to grasp and retain the precepts of Freemasonry?**

❖ **Are his motives for becoming a Mason good?**

## On-line Search Tools

Question 21 of the Oklahoma petition asks if the petitioner has ever been convicted of, pleaded guilty or nolo contendere (no contest) to, or received a deferred sentence for the commission of a felony or the equivalent thereof. A person guilty of the above may also be dishonest enough to falsely answer this question.

The following websites may be used for conducting simple, free checks of criminal history:

**Oklahoma Dept of Corrections:** Offender, Sex Offender and Violent Offender look up.

<http://www.doc.state.ok.us/offenders/offenders.htm>

**Oklahoma State Courts Network (OSCN)** : allows search by name.

<http://www.oscn.net/applications/oscn/casesearch.asp>

**Oklahoma Sex and Violent Crime Offender Registry:**

[http://docapp8.doc.state.ok.us/servlet/page?\\_pageid=190&\\_dad=portal30&\\_schema=PORTAL30](http://docapp8.doc.state.ok.us/servlet/page?_pageid=190&_dad=portal30&_schema=PORTAL30)

**On Demand Court Records** : covers 68 District Courts (some counties have more than one district court so it doesn't cover 68 counties).

<http://www.odcr.com>

**National Sex Offender Website** : Complete national registry of sex offenders. Look up by name.

<http://www.nsopw.gov/Core/Portal.aspx?AspxAutoDetectCookieSupport=1>