



OPERATIONS MANUAL *for* **LODGES OF INSTRUCTION**

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Grand Lodge LOI Committee

R.W. John Toto, Chairman
R.W. G. Edward Brown
R.W. Kenneth Brown

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Historical Perspective:

The original Lodges of Instruction system was first conceived in 1842 for the sole purpose of exemplifying the ritual to secure uniformity in the work. These Lodges of Instruction were held at irregular intervals in many of the districts throughout the state, and were designated by name; for example, the Highland Lodge of Instruction; and an annual session was held by Grand Lodge in Boston in December under the direction of the Grand Lecturers with their participation. This system was superseded by the exemplification now held annually in each Masonic district.

The more recent system of Lodges of Instruction was instituted in 1928 for an entirely different purpose: to instruct candidates, members and officers in the *symbolic* meaning of the ritual, and in Masonic history, philosophy, customs, and administration. It aimed to provide Masonic education in its broadest aspects. Its organization and administration are specifically provided for in Sections 259, 341-346 of the Grand Constitutions.

In 1996, the system of Lodges of Instruction was changed in favor of a more flexible system of Masonic Forums. These Forums operated under the same supervision as the former Lodges of Instruction but permitted a wider selection of Masonic and non-Masonic topics. The public was allowed to attend many of the regular meetings to showcase some of the inner workings of the Fraternity in response to many allegations of secrecy voiced during that period.

In 2002-2003 the Masonic Forums were restyled back to Lodges of Instruction and were geographically realigned into 31 districts that correspond with the new Grand Lodge district alignment that was implemented in 2002. District Deputies responsible for LOI as well as electing Officers of the LOI. Incentives for the encouragement of attendance. Masters and Wardens expected to attend.

MISSION STATEMENT:

The Lodges of Instruction have been established to reinforce, encourage, and practice the understanding of our Masonic tenets. It accomplishes this by providing education for candidates, officers and Lodge members, in a fraternal atmosphere.

The Lodges of Instruction Committee wishes to thank the 18th District for creating the framework for this LOI Manual.

GOVERNANCE AND OFFICERS

LODGE OF INSTRUCTION WARRANT

Each District Lodge of Instruction shall be authorized to hold meetings through a Warrant issued by the Grand Master.

LODGE OF INSTRUCTION GOVERNING STRUCTURE

The Lodge of Instruction governing structure is as follows:

1. District Deputy Grand Master
2. Worshipful Master/LOI Chairman of the Lodge of Instruction
3. If applicable, Executive Committee

(Note: The Grand Lodge operations supersedes all in this manual.)

Lodges of Instruction shall be governed by its appointed officers. The District Deputy Grand Master appoints minimum: LOI Master or Chairman/Coordinator, Senior Warden, Junior Warden, Secretary/Treasurer and a Marshal. This can be a progressive line or appointment. The DDGM may also act as LOI Chairman.

DISTRICT DEPUTY GRAND MASTER

The District Deputy Grand Master will oversee and be responsible for the operation of the Lodge of Instruction. He will act as a leader and promote attendance of the Lodge of Instruction throughout his district. His supervisory capacity is summarized as follows:

1. His primary responsibility is to ensure that the Lodge of Instruction will be active, operational and viable during the Masonic year from September through June.
2. The LOI Master will govern the Lodge of Instruction and be responsible for its programming during his term as Master. The DDGM always has input and final say.
3. He will appoint the Worshipful Master, Senior Warden, Junior Warden, Secretary/Treasurer, Marshal and Lead Instructor. The Secretary/Treasurer will be the District Deputy Grand Secretary/Treasurer or appointed by the District Deputy Grand Master.
4. The Marshal will be the District Deputy Grand Marshal or appointed by the District Deputy Grand Master. Unless he chooses to maintain a progressive line for the Master and Wardens
5. At the June LOI (of the DDGM's second year) he will appoint the next Junior Warden for the next two Masonic years. The Junior Warden must be a Worshipful Master or a Past Worshipful Master and appointed from a not previously appointed from.
6. He will ensure that all officers of the District Lodge of Instruction operate the Lodge according to the recommended agenda as set forth in this Manual.
7. Will ensure adherence with specified educational/instructional programs as spelled out in

- this Operations Manual and other guides and manuals issued by the Education Committee.
8. He will ensure that all instruction is given uniformly and that all instructors are duly qualified. It will be his responsibility to recruit qualified instructors from within his district.
 9. He will ensure that the Masters of the constituent Lodges are aware of the three levels of instruction being offered at each Lodge of Instruction. If there is to be a Fourth Class of Instruction this will be announced.
 10. He will ensure that the Worshipful Masters or Secretaries of the constituent Lodges notify the Secretary/Treasurer and the Lead Instructor of the Lodge of Instruction of the status of their candidates prior to the meeting. This is to ensure that adequate instructors are available.
 11. He will have the authority to cancel a scheduled meeting of the Lodge of Instruction should he decide, after consulting with the Worshipful Master, that doing so will be in the best interest and safety of the membership due to adverse weather conditions in the area. Such canceled meetings will not be rescheduled.
 12. He will be in regular communication with the LOI Master of the Lodge of Instruction on any matters that pertain to changes, deletions, additions or any other functions or concerns that need to be discussed relative to the Lodge operation.
 13. If applicable, He will preside at all meetings of the Executive Committee.
 14. All appointments, rulings, By-Laws and unsettled items will be decided by the District Deputy Grand Master.
 15. The DDGM is the catalyst that unites the Lodges within the district to ensure the success of the Lodge of Instruction.

LOI MASTER/LOI COORDINATOR or Master of LOI

The LOI Master/Coordinator will conduct the business and programming of his Lodge of Instruction according to the procedures delineated within this manual, and as follows:

1. He will ensure that at each meeting of his Lodge of Instruction, his officers are present prior to the opening of the Lodge meeting and that they are prepared to perform their respective duties prior to and during the Lodge of Instruction meeting.
2. He will ensure that qualified instructors are available at every meeting to conduct the necessary classes for the candidates attending. He shall assure himself that the classes are being conducted in a professional and educational manner for the benefit of the candidates.
3. He is responsible for the annual program of his Lodge of Instruction and shall ensure that it meets the minimum requirements of form and format.
4. He will have close communication with any scheduled speaker for the program he has arranged for the monthly Lodge of Instruction.
5. If a social collation is to be served he should contact the host Lodge seven to ten days prior to the meeting to ensure that refreshments will be provided for the Brethren and guest(s). *(This may be delegated to the Junior Warden.)*
6. He will maintain regular contact with the District Deputy Grand Master concerning the operation of the Lodge of Instruction.
7. He will work closely with the Secretary/Treasurer regarding the finances of the Lodge of Instruction to ensure that all required reports and documents are given proper attention after each Lodge of Instruction meeting and submitted as required in a timely manner.
8. He shall oversee the conduct of those attending the Lodge of Instruction.

9. The LOI Master shall appoint a Chaplain and Organist, and may appoint additional officers if the positions are approved by the District Deputy Grand Master.
10. LOI Master will decide with the assistance of the Secretary/Treasurer, from the attendance matrix, the attendance award and officers award and in which form it shall be (certificate/special gavel, etc.) to be passed from Lodge to Lodge on a monthly basis.
11. It is expected that Lodge Wardens will be in attendance for 7 of 10 LOI meetings in order to advance to the next chair. Final decisions are left to the Lodge Masters.

SENIOR WARDEN

Responsibilities of the Senior Warden are as follows:

1. He will become familiar with this manual and utilize it in the determination of programs for his year as Master.
2. In the absence of the LOI Master of the Lodge of Instruction, he will advance to the Master's chair and assume responsibility for the program planned for the evening.
3. He shall arrive at the specified location for the evening's program at least 15 minutes prior to the candidate's arrival to ensure the host Lodge has fulfilled their obligation in setting up the hall and Lodge of Instruction areas for the program.
4. He shall assist in securing the facility following the close of the meeting and assist the LOI Master and the Master of the hosting Lodge in these duties before leaving the premises.

JUNIOR WARDEN

He will be familiar with the duties and ritual of the LOI Master and Senior Warden and prepared to fill the highest vacant position and to the best of his ability carry out the duties of that station. Additional responsibilities of the Junior Warden are as follows:

1. He will be responsible for ensuring that the host Lodge has properly prepared in advance the collation for the evening, if any. He will also be responsible for ensuring the dining/collation room is properly prepared for the evening and that the room is properly cleaned and returned to its condition, and any contributions collected are turned over to the Secretary/Treasurer.
2. He will begin to formulate his program for the year in which he serves as Master and become familiar with this manual and utilize it in his determination of programs for his year.

SECRETARY/TREASURER

The importance of the work of this station is on par with that of Secretary of a Chartered Lodge. Records and minutes must be accurately maintained, and attendance records must be submitted *via MassMasons.com* in a timely manner following each meeting of the Lodge of Instruction. Additional responsibilities are as follows:

1. He is required to keep an accurate accounting of the attendance of Lodge officers, members, candidates and visitors at every Lodge of Instruction meeting. He will also ensure that all candidates are duly registered and receive the necessary instruction with the requisite

paperwork transmitted back to each candidate's home Lodge. While Lodges shall receive credit for all officers in attendance, *(even if an officer serves as an officer in another Lodge within the district)* the TRUE number of those attending shall be reflected in the attendance synopsis reported monthly to the Grand Lodge, all within ten days.

2. He shall be authorized to submit invoices to each constituent Lodge of the Lodge of Instruction by September 1st with a request for prompt payment to meet the Lodge of Instruction budget.
3. If there needs to be an adjustment in the Lodge of Instruction assessment to meet its operational expenses, the Secretary/Treasurer should recommend a meeting of the Executive Committee (or DDGM) for the approval of an additional assessment of funds from the constituent Lodges.
4. The Secretary/Treasurer is required to keep accurate records of the finances of the Lodge of Instruction.
5. He will be responsible for any correspondence or communication with the constituent Lodges of the District relative to notices of dates, times and places of the meetings of the Lodge of Instruction. He will also attend to any official correspondence with Grand Lodge.
6. He will distribute the annual program notices to the line officers of the constituent Lodges of his District and to other persons in accordance with the practice and budget of the Lodge of Instruction.
7. His records of the Lodge of Instruction shall be available to any member of the Executive Committee and the District Deputy Grand Master, in a reasonable amount of time upon request.

MARSHAL (May be the District Marshal)

1. He organizes the Lodge of Instruction prior to its opening and conducts the Chaplain to and from the Altar during the opening and closing of the Lodge.
2. He will assist in conducting the official attendance recording.

LEAD INSTRUCTOR

1. He will organize and assign qualified instructors for the candidate's instruction at the Lodge of Instruction.
2. He will report to the Worshipful Master and District Deputy Grand Master the results of his scheduled instructions at the end of each Lodge of Instruction.
3. He shall review the Massloi.org website for latest information.

APPOINTED OFFICERS

Should any appointed officer be unable to fulfill their obligation and complete their two years in their respective station, the District Deputy Grand Master shall appoint a new officer(s) to fill the vacant position(s).

Where applicable, If the Executive Committee believes an elected officer needs to be removed or replaced, the District Deputy Grand Master may remove such individual *at*

any time during the year and/or fill the vacancy by appointing a responsible past master from the replaced lodge who will assume the duties of the position.

SPEAKER'S BUREAU

The LOI Master shall arrange and coordinate all the qualified speakers for each LOI meeting, with the approval of the Executive Committee (if used), and utilizing the Grand Lodge Speaker's Bureau, the past speaker's list, and other known lists. Updated Speaker's Bureau is available on MassMasons.org and Massloi.org.

INSTALLATION OF OFFICERS (If needed)

The Junior Warden shall be appointed and installed in June (in the DDGM's second year) and serve the ensuing two Masonic years. See www.Massloi.org for more information.

DEVELOPMENT OF ANNUAL PROGRAM

DISTRICT LODGE OF INSTRUCTION REQUIREMENTS

1. Lodges of Instruction are required to plan ten meetings per year. Meetings: September to June.
2. Four meetings shall be from the Grand Lodge's LOI/Education Committee Officer's training topic which can be found on the Grand Lodge LOI website and (See Appendix D).
3. Six meetings can be any topic and/or a social event.
4. It is suggested you have at least one social event per year. (See appendix B)
5. Programs can be Masonic and socially oriented. The DDGM and LOI Master will determine "Closed" or "Open" meeting dates. Additional meetings may be scheduled for social and other events. The regular monthly programs should be formulated to have some Masonic relevance and educational value.
6. The DDGM with assistance of the LOI Master should be planning the LOI programming for the upcoming Masonic year. Once formulated, constituent Lodges will be informed for planning and to inform their members.

LODGES OF INSTRUCTION VENUE

The District Deputy Grand Master determines the time/place of Lodges of Instruction. They can be held in one central location or on a rotational basis.

INCENTIVE PROGRAM

Lodges of Instruction are required to have an incentive program. (See appendix C).

SUGGESTION ON CONDUCTING A MEETING

FORMAT FOR A LODGE OF INSTRUCTION MEETING :

The following is an example schedule.

1. LOI format/flow of meeting time:

6:00pm to 7:00pm Collation and/or Dinner
7:00pm to 7:15pm Opening and Attendance
7:15pm to 7:45pm Candidate/Members Instruction
7:15pm to 8:00pm Guest Speaker/Program/Closing (limit to 60 minutes)
Social period and/or Collation

(Note: Recommended to have candidates and their sponsor at the instruction. If the sponsor is not available, the candidate's Lodge Membership Officer should attend. Also, maybe candidate instruction 30 minutes before Opening to consider)

2. Regalia from host lodge (If needed or use Lodge's):

- Bible, Square and Compasses
- Gavel
- Marshal's baton (*if needed*)
- White aprons
- LOI officer's collars and station aprons

(Note: the District Officers who are at their station may wear the district collar and purple apron.)

3. Dress Code: (DDGM may change a LOI's dress code if it fits with the night's activities)

- All LOI officers Tuxedos (no gloves)
- All members Business attire or business casual
- Candidates Business attire or business casual

4. Member's Regalia:

- PDDGM's and Past Masters may wear their apron and pocket jewels.
- Top three officers of each lodge should wear their traveling apron and pocket jewel.
- Candidates should wear their members' lambskin and name tag if they have one.
- All members are encouraged to wear their lodge name tag.

(Note: any dress code or regalia issues are governed by the DDGM)

CANDIDATE INSTRUCTION

Candidates of the constituent Lodges within a Lodge of Instruction *are required* to attend a Lodge of Instruction of all three degrees prior to receiving a dues card from his Lodge. If a candidate is unable to attend due to work, illness, or other reasonable reasons, he may receive the required instruction in his Lodge by his Lodge's instructor or other qualified instructor. (See "Make-up Classes" below.)

Masters and Wardens of the constituent Lodges are required to attend *all* meetings of the Lodges of Instruction in their District during a Masonic year unless excused by the District Deputy Grand Master for suitable reasons. In addition, the Masonic sponsor of the candidate and other Lodge officers and members are encouraged to attend. Wardens must attend 7 of 10 LOIs in order to move to the next station. Exceptions are by the DDGM only with Lodge Masters input.

MAKE-UP CLASSES

If a candidate is unable to attend his local Lodge of Instruction, he may choose one of the following options:

1. Attending a neighboring Lodge of Instruction accompanied by his sponsor or an officer of his Lodge.
2. Wait until the next Lodge of Instruction to receive the requisite instruction, if convenient. Receive individualized instruction by a qualified instructor in his Lodge or at a mutually agreeable location. All with the authorization of the DDGM or the LOI Master.

OPENING AND CLOSING OF AN OPEN MEETING

A Lodge of Instruction will be opened in the following format:

- Organize the Lodge.
- Open the Great Lights on First Degree. Letter 'G'.
- Prayer.
- Pledge of Allegiance to the American Flag.
- Declare the Lodge of Instruction Open.
- Official Attendance Taken.
- Candidates (with Sponsor) Escorted to the East.
- Introductions and Instructors Assigned.
- Conduct the Program.
- Guest Speaker Program or Instructional Program.
- Presentation of Attendance Awards.
- District Deputy Grand Master for his final announcements and comments. (*No one* speaks after the District Deputy except the LOI Master to close the Lodge.
- Close. Prayer. Lights. Declare the Lodge of Instruction closed.

The Lodge doors remain open. The candidate instruction can be conducted prior to the

general meeting of the Lodge of Instruction. The instructional period shall last no less than 30 minutes and no longer than 45 minutes per class.

All Lodges of Instruction classes, including make-up classes, shall be conducted by qualified instructors.

LOI may be open to invited guests with the permission of the DDGM only and within Grand Lodge edits and guidelines.

OPENING AND CLOSING OF A CLOSED MEETING

OPENING:

LOI Master: * Brother Marshal, you will organize the Lodge of Instruction.

Marshal: *[Walks clockwise around Lodge room, closes doors, and observes that all Brethren (and guests) are in order and wearing aprons.]* Worshipful Master the X Lodge of Instruction is duly organized.

WM: Brother Senior Warden, it is my order that the X Lodge of Instruction be now open, and stand open for the dispatch of such business as shall regularly come before it. This, my will and pleasure, you will communicate to the Junior Warden in the South and he to the Brethren present for their government.

SW: Brother Junior Warden.

JW: Brother Senior Warden.

SW: It is the order of the Worshipful Master that the X Lodge of Instruction be now open, and stand open for the dispatch of such business as shall regularly come before it. This, his will and pleasure, you will proclaim to the Brethren present for their government.

JW: Brethren, you have heard the order of the Worshipful Master as communicated to me by the Senior Warden in the West. Take due notice thereof and govern yourselves accordingly.

[The Marshal proceeds to the west of the Altar and places the Three Great Lights in the Entered Apprentice position.]

No Signs are given in a Lodge of Instruction.

[The Marshal conducts the Chaplain to the west of the Altar for the benefit of prayer.]

CHAP: *[Opening prayer]* Amen.

RESPONSE: So mote it be.

WM: Brethren will join me in the Pledge of Allegiance to our Flag. WM: I declare the X Lodge of

Instruction open in form.

CLOSING:

No Signs are given in a Lodge of Instruction.

WM: * Brother Senior Warden, it is my order that the X Lodge of Instruction be now closed and stand closed until our next regular communication. This, my will and pleasure, you will communicate to the Junior Warden in the South and he to the Brethren present for their government.

SW: Brother Junior Warden.

JW: Brother Senior Warden.

SW: It is the order of the Worshipful Master that the X Lodge of Instruction be now closed and stand closed until our next regular communication. This, his will and pleasure, you will proclaim to the Brethren present for their government.

JW: Brethren, you have heard the order of the Worshipful Master as communicated to me by the Senior Warden in the West. Take due notice thereof and govern yourselves accordingly.

[The Marshal conducts the Chaplain to west of Altar for closing prayer and returns the Chaplain to his seat.]

CHAP: *[Closing prayer]* Amen.

RESPONSE: So mote it be.

[The Marshal closes the Three Great Lights.]

WM: I declare the X Lodge of Instruction closed. *

Appendixes:

Appendix A: Executive Committee:

The Executive Committee shall consist of the District Deputy Grand Master, LOI Worshipful Master, Senior Warden, Junior Warden, Secretary/Treasurer, Junior Past LOI Worshipful Master, and any district member appointed by the District Deputy Grand Master. The additional responsibilities of the Executive Committee are as follows:

1. The District Deputy Grand Master shall oversee the operation of the District Lodge of Instruction and will chair and moderate the meetings of the Executive Committee. He shall not necessarily conduct or preside over the monthly meetings of the Lodge of Instruction unless he has been duly installed to do so or is presiding due the absence of all three

appointed officers.

2. It will be the District Deputy Grand Master's responsibility to call the Executive Committee together at least once during the Masonic year. This meeting shall be in May for the Committee's recommendation of the next appointed Junior Warden from the assigned rotation list of Lodges.
3. The District Deputy Grand Master may call additional Executive Committee meetings as he sees fit or as conditions warrant.
4. Finances for a District Lodge of Instruction shall be finalized no later than the May meeting of the Executive Committee and approved by the committee for the purpose of setting the operational expenses for the upcoming year, and to set the amounts due by each constituent Lodge. All payments by the constituent Lodges must be made in advance and are due to the Lodge of Instruction by November 30th of the current Masonic year.
5. Each member of the Executive Committee shall have one vote. No proxies or substitutes are allowed as part of the Executive Committee. No votes are allowed by mail and an officer must be present in order to vote. A majority of the members of the Executive Committee shall constitute a quorum and may act. In the event of a tie in votes on a subject in question, the District Deputy Grand Master shall break the tie.
6. It shall be thoroughly understood that each constituent Lodge shall share all operating expenses of a Lodge of Instruction. An annual financial statement shall be issued and interim reports may be issued when requested by the Executive Committee and the constituent Lodges. All unused funds shall be applied to the subsequent year's budget.

Appendix B: District Social Events: See www.Massloi.org

Examples of District Events:

1. Off-site meeting of LOI to promote fellowship
2. Planning charity event - Promoting Freemasonry in the community
3. Fall event: Apple-picking/Hayrides; sporting event; Dinner/dance; Holiday party
4. Spring/summer event: District BBQ; dinner cruise; museum tour, etc.

Appendix C: Incentive Program: See www.Massloi.org

1. Large and Small gavel for most officers in attendance and most members
2. Monetary gift to charity choice of Lodge with most members attending
3. Gift certificates for candidates reaching 3rd Degree
4. Each Lodge sponsors a dinner with proceeds to Charity fund to be disbursed by vote

Appendix D: Education: See www.Massloi.org

- Protocol, Grand Lodge Edits, Constitution and Administration
- Investigation Committee Review
- Honors/Awards - Which to give, requirements and when
- Obligations to your Lodge, each other, and community
- Masonic Funeral Service
- Building Associations
- Lodge Finances
- Lodge Officer Duties
- Speaking about Freemasonry, appendant bodies of Freemasonry