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Educating the Mason: An Education Manual for the Masonic Lodge

A Tool for Lodges to use to Develop and Implement a Structured Education Program

Fourth Edition

SEPTEMBER 2021



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Preface

In 2017 I began an effort to develop a plan that a lodge could use to create and implement an education program that would encompass the full masonic journey from the time a prospective candidates initiates contact with a mason or a lodge and then all the way through a masonic journey. The goal was a document that could be used in full, or by section as a particular lodge deemed necessary and appropriate to organize and present education to its members and prospective members.

I conducted a lengthy and detailed “Needs Analysis” of the educational needs of a generic mason from the time he first approaches and contacts a mason or a lodge, all the way through a notional masonic journey, accounting for those who go through the line to ultimately become Past Masters, and those who choose not to become officers of a lodge. The result was the identification of unique milestones in a journey and the development of my “Formal Masonic Education Blocks” which became the basis of my analysis and the foundation of the entire education manual. You will find the Formal Masonic Education Blocks depicted and fully explained in this manual as the central premise for the concept of an “end-to-end” education plan for masons.

In 2018 I “published” the first edition of the *“Lodge Education Manual”* and the initial feedback from brother masons indicated some gaps and inadequacies existed in some of the topics and sub-topics. I went back to the drawing board in late 2018 and re-worked some of the material, corrected errors I missed in pre-publication of the first edition, and in January 2019 I published the second edition. Almost

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immediately after publishing and sharing the second edition I received feedback that there were still gaps in the content. In particular, one brother asked if it was possible to add information about providing masonic education for family members. Sometimes it's a forehead slap, sometimes it's a thunderclap, but when an epiphany of that scope occurs it arrives as that "ah ha moment". This was a significant gap that actually impacted the total value of the entire document. There was no question that I had to address educational concepts and methods for our families and it needed to be included immediately.

One week after publishing my second edition I went back to the drawing board, and I mean that I went all the way back. This was not tinkering with some sentence structures or including passing references, this was a new Needs Analysis to determine the what, when, and how of masonic education for family members. I determined at the outset that it made sense to overlay the needs of the family over the Formal Education Blocks I designed for the mason. This saved me a lot of time and allowed me to complete my analysis and integrate my new material fairly quickly and two months after I published the second edition, I was ready to publish the third edition and did so in March of 2019.

I fully intended the third edition to be the final edition with a possible exception of a "dot version" (edition 3.1) to clean up any typos and I specifically stated I did not intend any further revisions to the core material.

Time passes and minds change. I have not only decided to produce a fourth edition, but to publish it as a book as well. Through much of the end of 2020 and the first half of 2021, I produced a paper on mentoring and how mentoring is implemented in freemasonry. It became clear to me that this paper provided potentially useful "how to" information on implementing effective mentorship programs within a masonic lodge. My third edition suddenly seemed inadequate in addressing what I would argue is our most critical method of delivering masonic and freemasonic knowledge to masons.

In this 2021 revision to my original Education Manual, I have added an entirely new section (Section 7) that specifically addresses mentoring from the perspective of its criticality, its potency in shaping a mason's behavior and outlook, and its efficacy as a method of delivery of necessary knowledge and history.

I hope you find *"Educating the Mason: An Education Manual for the Masonic Lodge"* useful and I hope that it serves our lodges in some fashion. Feedback is always welcome and I look forward to hearing from my brothers on their thoughts and ideas on the vital topic of education within our masonic fraternity.

1. Introduction

This manual is intended and designed as a tool for lodges to use to provide organized and continuing education to our brothers, their families, and even to prospective brothers. This includes preparing men and prospective brothers for masonry who may be considering petitioning for the degrees in freemasonry, and continuing through his first three degrees and beyond. This manual defines and describes the initial education of the curious, a petitioner, the candidates for each of the three degrees, the proficiency of the new Master Mason, and continuing on to prepare our brothers for service in the officer line, and finally as Past Masters and mentors. The goal is to provide the brethren of any Texas masonic lodge a full line of officers that are qualified and prepared to assume increasing responsibilities, and to provide each brother a foundation of knowledge upon which they can build their masonic future and chart their own unique masonic journey.

This manual does not, and is not intended to control, direct, or otherwise intrude on esoteric instruction which is otherwise guided by Grand Lodge law, the Grand Lodge Committee on Work, and a lodge's esoteric instructors. In addition to traditional esoteric instruction, there is much knowledge available to every petitioner, candidate, and mason that will inform them on matters of masonic history, masonic traditions and customs, and on running a lodge. This manual addresses that information which lies beyond the esoteric material and instruction.

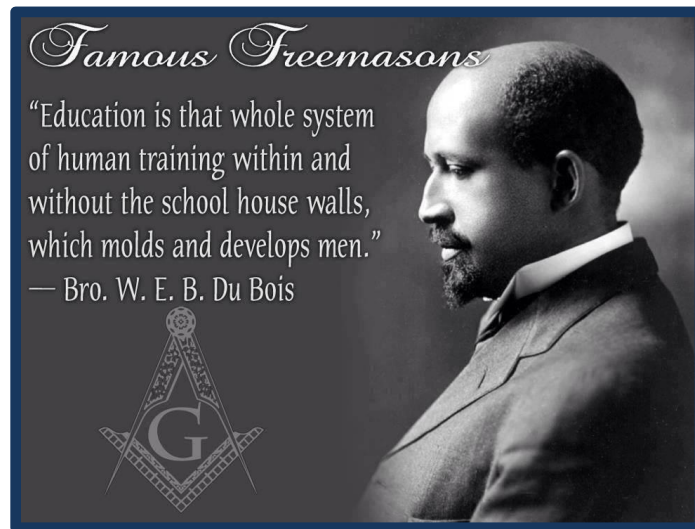


Figure 1 - Bro. W.E.B. Du Bois

2. Definitions (Terms of Reference)

Additional Lodge Light (A.L.L.) Program – The educational program administered to newly raised Master Masons to provide further light to teach Masonic principles in the degree proficiencies using a work book coupled with one-on-one instruction methodology. This program will comprise a portion of the Total Lodge Education Program. (REF: Article 439)

Blue Books – See Texas Lodge System of Candidate Information

Counselor – A Counselor within a masonic lodge is typically charged with administration of the L.I.F.E program and is referred to as the LIFE Counselor. Depending on the lodge, he may also administer the ALL Program. He is usually a senior, experienced member of the lodge and should be a Past Master with the experience to answer candidates' questions and explain the instruction and questions in the LIFE and ALL program guides.

District Education Officer (DEO) – When so appointed the assistant to the DDGM responsible for advising him on matters of masonic education, and for assisting lodges with education programs and plans. (REF: Article 111)

District Service Team (DST) – A District Service Team, when so appointed by the Grand Master, is led by the District Deputy Grand Master (DDGM) and supported with a District Instructor (DI), a District Education Officer (DEO), and District Communications Officer (DCO). (REF: ART 126g, ART 111)

Education – For the purpose of this manual, the term “education” refers to the information and knowledge imparted regarding masonic traditions, masonic history, lodge processes and operations, officer duties, law, and other non-esoteric masonic information. Education occurs on a continuum from pre-petition to Past Master and beyond. It is separate and independent from “instruction” which is administered through esoteric and ritualistic instruction, guided by the Grand Lodge Committee on Work.

L.I.F.E. / A.L.L. Counselor – The LIFE/ALL Counselor administers those programs, manages the resources, and ensures compliance with Articles 276a (L.I.F.E.) and 439 (A.L.L.)

Lodge Education Officer (LEO) – The Lodge Education Officer is appointed by the Worshipful Master and is the point of contact within the lodge for educational programs and materials. *Traditionally the* LEO is a member of the By-Laws Rules & Regulations Committee, Mentorship Committee, and a Yearly Transition Committee.

Lodge Masonic Education Committee – Usually comprised of Senior Warden, Junior Warden (Chair), Senior Deacon (Vice-Chair), Junior Deacon, Marshal & Master of Ceremonies, Historian (when filled) and the Lodge Education Officer.

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Instruction – For the purpose of this manual, Instruction refers specifically to the teaching of esoteric work under the purview of Grand Lodge law and the Grand Lodge Committee on Work. Instruction is distinct from masonic education and is typically managed and conducted by lodge instructors in accordance with Grand Lodge guidance and law. (REF: Chapter 17 – Title I, Articles 127 – 142)

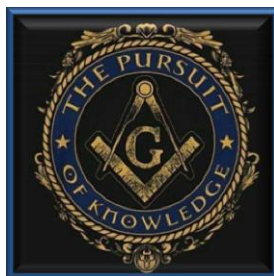
Instructor – An instructor, as also the term instruction, is associated with the esoteric work and operates under the provisions of Grand Lodge law and the Grand Lodge Committee on Work. (REF: Chapter 17 – Title I, Articles 127 – 142)

Lodge Instruction For Effectiveness (L.I.F.E.) – The preparatory course designed to provide necessary information for the Junior Warden, Senior Warden, and Worshipful Master. The course has one workbook for each chair. For the purpose of Form 101 qualification, the LIFE program serves as a one-for-one substitute for attending the Grand Lodge's Officer Leadership Training (OLT) (formerly known as the Wardens' Retreat). While technically serving as a substitution for OLT, the course content is less comprehensive and falls far short in terms of quantity of information. (REF: Article 276a)

Mentor – For the purpose of this program, a mentor is a brother who imparts knowledge – actively (intentionally) or passively (unintentionally) - based on his accumulated experiences and his understanding of lessons learned from them.

Officer Leadership Training (O.L.T.) – This is the annual education seminar held by the Committee on Masonic Education and Service at several locations around Texas every year. It qualifies a brother for election to the Junior and Senior Warden stations, either one of which is then required for progression to Worshipful Master. (REF: ART 276a)

Texas Lodge System of Candidate Information (T.L.S.C.I.) – these is a series of books (currently five) that we provide to petitioners (once elected to receive the degrees) and candidates. Article 433 of Grand Lodge of Texas law directs the use of these books. Traditionally, lodges have a committee to oversee this program and it is normally comprised of the Senior Deacon (Lead), the Marshal, and the Master of Ceremonies when this position is filled. (REF: ART 433)



3. Roles & Duties

District Education Officer (DEO) – When appointed [by the Most Worshipful Grand Master] serves as the facilitator in his district for the lodges in the procurement and provision of education programs. The DEO works closely with the Committee on Masonic Education and Service to ensure alignment of programs, resources, and objectives between the Committee and the lodges. He hosts an annual seminar and facilitates the annual Briscoe Workshop. The DEO assists lodges in the development of education programs and with obtaining material, speakers, and other required program elements.

The DEO has no directive or enforcement authority and serves only as an advisor and as a resource for the Worshipful Masters and Lodge Education Officers. The DEO is a member the Masonic District Service Team that is headed by the District Deputy Grand Master (DDGM). (REF: ART 111)

Worshipful Master (WM) – the Worshipful Master has charge over the lodge and is thus responsible for the education of the brethren and prospective candidates for the degrees. The WM appoints the Lodge Counselor and/or Lodge Education Officer (LEO). These could be the same, or the LEO might oversee other appointed brothers charged with instruction and education. The Worshipful Master – through his appointed representatives – manages all aspects of instruction and education in his lodge.

Lodge Education Officer – appointed by the WM, point of contact for the lodge education programs and ensures Articles 276, 276a, 433 and 439 of the Law Book of the Grand Lodge of Texas are adhered to. Assists in administration of education programs in accordance with the direction in Articles 433 and 439 and serves as a facilitator for lodge members in obtaining and provision of educational programs. The Lodge Education Officer should, if at all possible, be a Past Master who is familiar with the duties and knowledge requirements of each officer. (REFs: ART's 276, 276a, 433, 439, and Chapter 17 – Title I, Articles 127 – 142)

Lodge Committee for Candidate Information – appointed by the WM, implements the T.L.S.C.I. program in accordance with Article 433 of the Law Book of the Grand Lodge of Texas. The committee is traditionally comprised of the: Senior Deacon, Marshal, and Master of Ceremonies as charged at their installation in office. (REF: ART 433)

Lodge Instructor(s) – appointed by the WM and provides the esoteric and ritual instruction for candidates and degree teams in accordance with the Grand Lodge of Texas Committee on Work. Lodge instructors are not covered by this education program due to their responsibilities to the Committee on Work which provides necessary instruction and facilitation. (REF: Chapter 17 – Title I, Articles 127 – 142)

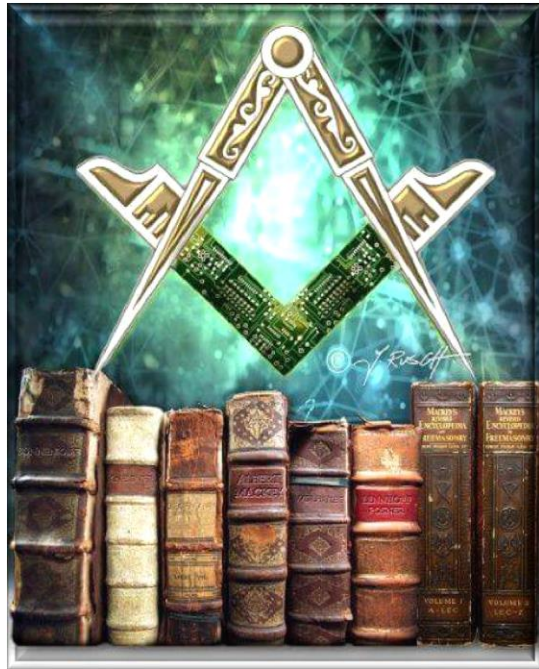
Master Mason(s) – every Master Mason is an educator and mentor. It is the duty of the LEO to ensure lodge members (MM's) understand that candidates, EA's, FC's, and new MM's look to our brethren to learn everything from lodge etiquette, lodge processes/functions, history, roles & responsibilities, and much more. This is a role that falls naturally and is not appointed and is no different

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than that of mentor. We all mentor, whether we intend to or not; our words and actions are absorbed as lessons by candidates and young masons alike, so it is the responsibility of each MM to educate through proper masonic behavior and the pursuit and sharing of knowledge.

Past Masters – Past Masters have a critical role in ensuring line officers are proficient in the duties and ceremonies of their stations. Past Masters are uniquely qualified to mentor our line officers in their stations and in preparation for their next station. Past Masters have experienced the stations and learned the necessary work and duties and are well-positioned to teach our line officers everything from scripts, degree preparation (degree master), examinations, reception of visitors and DDGM's, and other fundamental information associated to their duties.

Mentor – A mentor is the most critical educator in a masonic lodge. A mentor is a mason who may be formally assigned as such for a new mason or may result informally from an informal association with and among brothers. The main difference in a formal mentor and an informal is the designation and the direct assumption of responsibility for a brother. While all masons mentor through their behavior and sharing of experiences, some will be formally appointed to educate.



4. Educational Concept Design

Formal Blocks – This manual and the educational concept it recommends recognizes seven formal education blocks which closely align with specific, common milestones in a mason’s journey. Education methods and materials are aligned according to the blocks and the related learning requirements. It is important for Lodge Education Officers and instructors to remember the blocks can and do overlap as illustrated in Figure 2 and Appendix I. Blocks of education are necessarily preparatory for sequenced, future blocks.

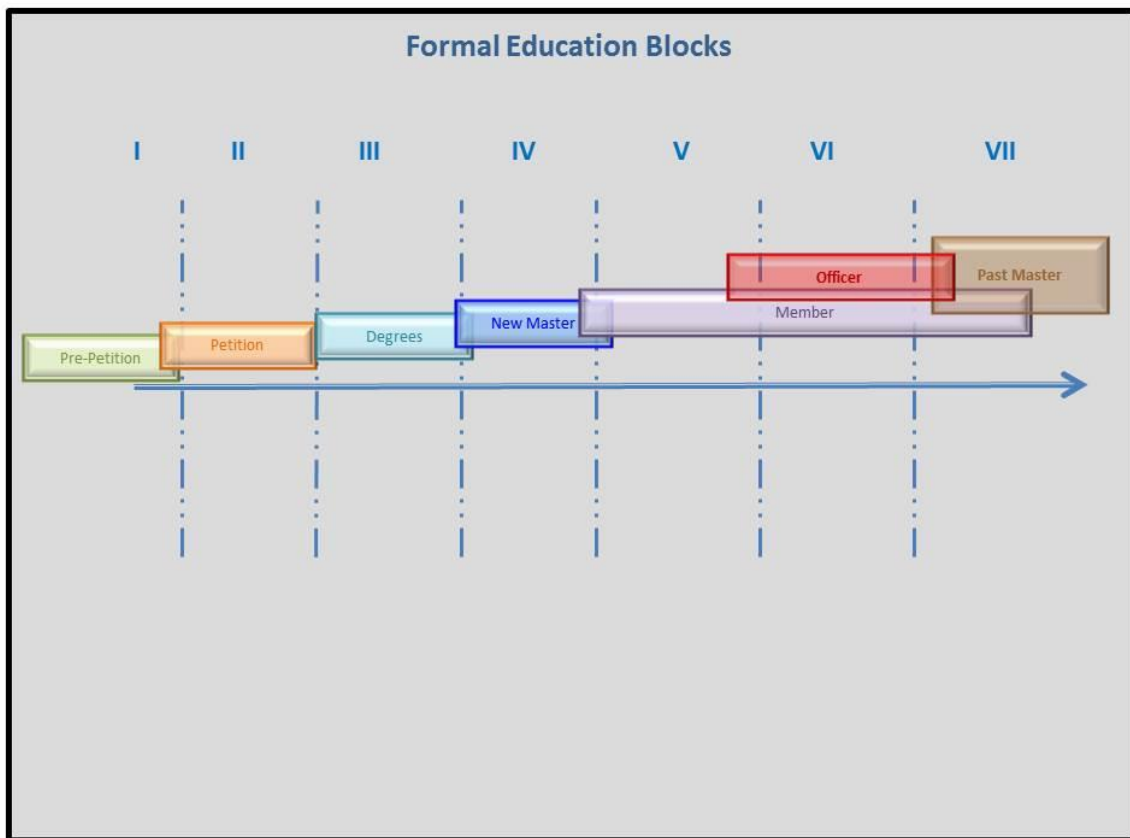


Figure 2 Formal Education Blocks

I. Pre-petition – The pre-petition phase is where we introduce masonry to the non-mason through discussions, walking tours of the lodge, and social events. An Open House event is a great opportunity to invite men in to meet masonry, face to face. Consider encouraging prospective candidates to *avoid* internet searches and online material regarding masonry and the degrees.

II. Petition – Once the prospective candidate submits a petition and is elected to receive the degrees, he advances into a new formal education block, the “Petition” block, with official learning material, and preparation for his first degree. The candidate is invited to lodge with his family and given his first book in the TLSCI series. A member of the lodge should review the book with the candidate and his family.

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Attending social events and Open Houses is even more highly encouraged, and a mentor might be matched to the candidate. The Candidate should be encouraged to avoid reading internet material about masonry and the degrees if he was not so encouraged in the first block. (REF: ART 433)

III. Degrees – The next block is the period of time where the candidate receives his degrees, completes his proficiencies in each degree, and continues the formal education required in the Texas Lodge System of Candidate Information; he is presented the Entered Apprentice and Fellowcraft books immediately upon receipt of those degrees. Additional education can be presented through supplemental sources such as The Monitor of the Lodge and, perhaps the Law Book of the Grand Lodge of Texas. The emphasis in this block however is the esoteric instruction and keeping the brother on and within the timeline directed through the law book. It would be valuable for the candidate to participate in degrees in roles suitable to his status – for example, many lodges have their newest EA perform a particular, key role in the EA Degree to reinforce the lesson he himself learned in the northeast corner. It is recommended the candidate’s mentor or other brothers take him to other lodges to watch the degrees soon after he receives them. This will help his instruction and begin his fundamental education by introducing him to the concept of visiting lodges and brothers. When the Grand Master hosts “Grand Master Conferences” that are open to all brethren, regardless of degree status, mentors or LEO’s should take lodge EA’s and FC’s to expose them directly to the Grand Master as he provides his vision and guidance. (REFs: Chapter 17 – Title I, Articles 127 – 142; ARTs 433 & 439)

IV. New Master – The block of education for the newly raised master mason is relatively short and his primary concern is completing his catechism and his required education through the Additional Lodge Light (A.L.L.) program. Additional education can be provided through The Monitor of the Lodge and perhaps the Law Book of the Grand Lodge of Texas. The new MM should be encouraged to move quickly through this block which officially ends when he submits his MM catechism, completes the A.L.L. program, and finishes the Master Mason book in the T.L.S.C.I. series. (REF: ART 439)

V. Member – The new brother is now a full member of the lodge. This block may be the top or final block for any given brother who does not desire to go into the line to be an officer. The brother should continue his education even if he does not wish to hold an office – he could change his mind at any time. The full range of educational material is available to the brother as well as unaccompanied lodge visits and participating in all of the degrees, plus, he can now pursue personal a personal reading program using commercially published masonic books. This is the block where all members should complete the L.I.F.E. program because this is a preparatory task for the Officer Block (ART 276a).

VI. Officer – A brother who is available for the line, or at least willing to hold appointed positions, enters the “Officer Block” of education. The brother should begin the preparatory work for an officer position before his appointment and installation. This block is specifically tailored to preparatory education, but it clearly overlaps the Member Block where the brother may be engaged in other educational efforts such as formal and personal reading, degree participation, lodge visits, and Continuing Masonic Education; those efforts do not need to stop when a brother enters this block of education. Finally, brothers in the Officer Block should look for opportunities and offerings by Grand Lodge such as

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Secretary's School, Treasurer's School, or other opportunities to learn about lodge administration. (REFs: ART 276, 276a)

VII. Past Master – Past Masters are not “finished” their education, in fact, as de facto mentors, the pro-active PM will be involved in personal reading, formal reading, and degree participation and instruction to expand his personal expertise for application in his mentorship role. The Past Master may also avail themselves of other educational opportunities such as Grand Lodge education sessions (i.e. Secretary School, Treasurer School, etc.) if they have not previously attended them or if they are new offerings.

Formal Block Content, Providers, and Sources – Between Grand Lodge material, on-line material, media presentations, books, and word of mouth, there is a wealth of information available for each formal education block. We as leaders in our lodges are charged with two responsibilities:

1. Identify and obtain valid educational material for our brothers
2. Introduce it and integrate it in logical sequences that build knowledge, yet do not overwhelm a brother's senses or ability to absorb and understand

In the formal blocks section, I identified a sequence according to generic masonic milestones. In this section, I identify content, providers, and sources for those formal blocks and match that content to the blocks and milestones. It is good to restate that blocks can and do overlap in some cases, so Lodge Education Officers or lodge counselors should be prepared to support a brother with educational needs in two or more blocks.

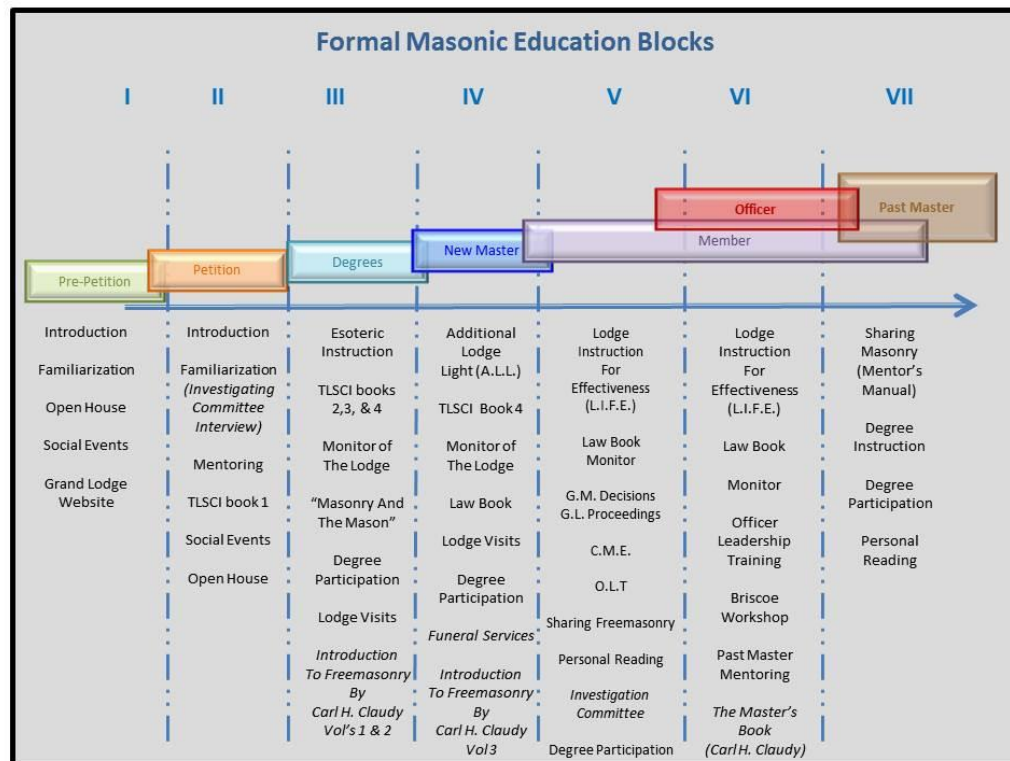


Figure 3 - Formal Masonic Education Blocks with Content Integrations (full size graphic in Appendix I)

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Integrating Material into the Blocks – In an earlier section, I identified the Formal Education Blocks according to the milestones. Now it is time to introduce specific types of education into those blocks. The “*Formal Masonic Education Blocks*” are defined and documented below and in Appendix I. These blocks form the core of the educational concept which forms the basis of this manual.

I. Pre-petition – A man’s first contact with masonic educational material is during the pre-petition block, perhaps during an open house or a social event, or even just a man asking a friend “*aren’t you a mason? What is that?*”? What many brothers do not consider is that masonic education begins the moment that good man requests information about masonry or joining a lodge. It is incumbent on a brother in this situation to remember he is now educating that man and the next words he says could influence the decision and masonic future of the questioner; many masonic journeys begin at that very moment. If a lodge has plan and education program, that brother could be prepared to provide initial educational material that satisfies the Pre-petition Block, propelling the prospective candidate onto the path of his masonic journey. According to this block, the lodge or the brother can and might provide:

- Prepared “elevator speech” – All brothers should have a 2 – 3 minute “elevator speech” ready to deliver to a questioner
- Walking tour of the lodge with tutorial and Questions & Answers
- Grand Lodge material – pamphlets, Grand Lodge website information

II. Petition – Upon submission of a petition, a prospective candidate has now opened the door for more formal, more well-defined instruction. One of the first opportunities to provide official educational information to a prospective candidate is during the Investigation. The Investigation Committee should use the opportunity to impart educational information to the prospective candidate and family during the course of their interview. During this block, the lodge should provide:

- Direct education through the investigation interview and during visits to the lodge – information
- Encourage prospective candidate to avoid contamination from internet research or other commercial publications – education on the problems of public information and the potential negative effects on a candidate’s expectations
- Once, elected to receive the degrees, appropriate book of the Texas Lodge System of Candidate Information (TLSCI) (Formerly referred to as the “Blue Books”) (Art. 433)

III. Degrees – Formal education and instruction is underway in this block. Lodges can/should provide:

- Esoteric instruction (under the auspices of an esoteric instructor and the Grand Lodge of Texas Committee on Work (separate from, but integrated into the lodge education program)
- TLSCI EA and FC books as required by Article 433 of the Law Book of the Grand Lodge of Texas
- Books – *Masonry and the Mason*; “*Introduction to Freemasonry*” (Carl. H. Claudy) Vols 1 - 2
- Monitor of the Lodge
- Degree Participation – Learn degree roles

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- Lodge Visits – Take the candidate on lodge visits to see the degree commensurate to the one he most recently received; EA's should see EA degrees, etc (be prepared to answer questions and point out relevant points)
- Attendance at Grand Master's Conferences (when they are declared open for all)
- Candidates should be made aware that new candidates coming after them will look to them as examples; new candidates will measure and layout their behavior and progress against theirs and they should bear this in mind at all times. They are now mentors!

IV. New Master – With his raising, the new Master Mason has two specific required programs to complete to formally move to the next block (V. Member). During this block the lodge MUST provide per Article 439:

- Additional Lodge Light Program
- Master Mason book of the TLSCI (as required by Article 433 of the Law Book of the Grand Lodge of Texas)

The Lodge might also provide education through:

- Monitor of the Lodge & Grand Lodge Law Book
- *"Introduction to Freemasonry –Master Mason: Volume 3"* (Carl H. Claudy)
- Degree Participation
- Lodge Visits
- Attendance at Grand Master's Conferences
- Attendance at Grand Lodge ceremonies – i.e. Cornerstone

V. Member – Our brothers in this block have the full spectrum of educational material available to them as they please. Some brothers will have no desire to pursue further blocks (Officer and Past Master) if they have no desire to serve as an officer of the lodge. They should be encouraged to continue their education because they will be mentors (even if informally and unintentionally) and one day, they may be called upon to serve in appointed or elected offices due to lodge circumstances. If education continues beyond the New Master Block, they will be vastly more prepared in the event they are called to serve the lodge in a time of need. **All members should be trained on how to do investigations so they can serve on Investigation Committees. Grand Lodge provides guidance to use for this training.**

Lodges should strongly urge or require brethren in the "Member Block" to complete:

- Lodge Instruction For Effectiveness (L.I.F.E.)

Lodges should encourage all brethren entering the "Member Block" further their education through:

- Reading the Monitor of the Lodge
- The Grand Lodge of Texas Law Book
- Attend Grand Lodge Annual Communication and Grand Master's Conferences
- Grand Master's Decisions

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- Grand Lodge Proceedings
- Candidate Instruction
- Reading “Sharing Freemasonry” (formerly “The Mentor’s Manual”)
- Officer Leadership Training (formerly “Warden’s Retreat”)
- Continuing Masonic Education (provided by teams of brothers through the Scottish Rite)¹
- Attend Masonic Funeral Services
- Lodge visits
- Personal reading - the lodge should have a list of credible masonic books from trusted authors; suggested reading lists are provided in Appendices III and IV of this manual

VI. Officer – Brothers seeking elective or appointive positions should begin preparing during the Member Block because the decision to accept a nomination or appointment can come abruptly with little or no notice; so the more prepared a brother is, the better he will perform as an officer. Education and training for lodge officers should include:

- The *Grand Lodge of Texas* Law Book & Monitor of the Lodge
- “*The Master’s Book*” (Carl H. Claudy)
- Attend Grand Lodge Annual Communication
- Attend Grand Master’s Conferences
- Officer Leadership Training (O.L.T.)
- Lodge Instruction For Effectiveness (L.I.F.E.)
- Briscoe Workshop
- Past Master Mentoring

VII. Past Master – Past Masters owe it to the lodge and to the officers coming along after them to actively mentor the elective and appointive officers. Line officers must be taught their responsibilities and if the Past Masters don’t do it, it does not happen effectively or before they assume office. Past Masters should prepare themselves through:

- Attending Grand Lodge Annual Communication
- Attending Grand Master’s Conferences
- Reading “*Sharing Masonry*” (formerly “*The Mentors Manual*”)
- Degree Instruction and participation
- Candidate instruction
- Personal Reading (a suggested reading list is provided in Appendix IV of this manual)

¹ Not available in all jurisdictions



Figure 4 Train Him Well

5. Program Implementation

There is no Grand Lodge of Texas requirement for a mandatory, formal education program. This program manual therefore, is a suggestion and a tool for use by lodges in addressing education throughout a member's learning continuum (aka "masonic journey"). This section provides options for implementing the processes and suggestions in this manual at your lodge and describes the implementation as a whole, or with variations. One size does not fit all lodges, so a lodge has options as to how and what parts of this manual to implement.

Recommended Elements, Actions, and Resources – To implement this manual on either a mandatory, optional, or partial basis, certain elements are strongly recommended to enhance the utility and results.

I. Direction and Definition – The plan (or such parts as will be implemented) should be defined and documented to provide clear expectations for participants and measurable attributes for the Worshipful Master. This can be done through a committee report that is voted and accepted, or perhaps through incorporation into a lodge rule book. The documentation should specify how the plan was approved, how it was scoped, and the expected outcome (objectives).

II. Oversight – The Worshipful Master should appoint someone to manage and oversee the lodge plan; someone who can observe the implementation and measure the plan performance. The level of authority for this brother to make adjustments or changes should be specified in the original documentation. The WM can consider a Lodge Education Officer, a Lodge Counselor, an elected officer of his line, or perhaps a Past Master to lead his education effort. The likelihood of success will depend largely on the levels of authority and experience of the appointed program manager.

III. Educational Materials – Someone, perhaps the brother designated to perform oversight, needs to review the scope of the plan to be implemented and then ensure the necessary materials are either available or are ordered. One sure way to stop a plan in its tracks is to underfund it or under-resource it.

Mandatory Implementation – If a lodge desires to mandate the implementation of this manual or some form of it, this can be accomplished in different ways.

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Incorporate into Lodge Rules – The lodge might require the implementation of this manual through an update to their lodge rules. This is probably the best method to ensure continuation of the plan beyond the current masonic year. This document should specify the control measures (i.e. timelines, expected outcomes, etc.) for use later in evaluation of the plan performance.

Worshipful Master Direction – The Worshipful Master can direct the implementation of the manual and have it documented in the minutes along with his statement of expectations (i.e. timelines, outcomes, etc.) This method would not necessarily carry over to the next masonic year.

Lodge Member Motions/Lodge Vote – This method will capture the decision in the minutes, but could be changed by a new motion and vote under parliamentary procedure in the future.

Optional Implementation – Optional implementation might entail making the manual available for brethren to use and track themselves. Under an optional implementation, a decision would be needed as to whether to capture results for evaluation of the performance of the education plan. The Worshipful Master can always appoint someone to be in overall “charge” for the purpose of keeping track of the materials and who is participating, but this implementation does not lend itself to longevity or widespread increases in general knowledge by the brethren.

Partial Implementation – To partially implement this manual, someone in a decision-making position should decide what parts of the manual to implement. Typically, Blocks III and IV are automatically implemented due to requirements in the Grand Lodge of Texas Law Book that require at least some elements to conform to the pertinent law book articles. Some formal education blocks as defined in this manual could be implemented independent of others, depending on a lodge’s particular need. This is not necessarily ideal since some blocks overlap and share common educational material.

Ultimately, each lodge must evaluate this manual against its own requirements.

Oversight – There are different ways to provide oversight for a lodge education plan and program, depending on whether the implementation is mandatory, optional, or partial.

Lodge Education Officer plus Committee – A very effective way, is through the appointment of a Lodge Education Officer (LEO) and committee. This provides accountability to and through the Worshipful Master to the members of the lodge, yet allows for the delegation of specific parts of the program to different brothers. The LEO might delegate the T.L.S.C.I. program to the Senior Deacon, L.I.F.E. program to a Past Master or another well-qualified brother, and so forth. Or, the LEO might delegate according to the education block and place a brother in charge of Blocks I and II, another officer or brother in charge of Blocks III and IV, and so forth. Whichever variation is chosen, this oversight method is probably the most effective for control of the program and accountability to the lodge. With a LEO and a committee, the Worshipful Master can request or require periodic reports to the lodge on the status of the program and the brothers in the various education blocks and permits the Master and lodge to make adjustments or obtain resources as necessary.

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Lodge Education Officer Only – This implementation would provide oversight and accountability, with the LEO doing all the tracking and reporting while attempting to manage each block of training. In this model, the LEO can still manage the traditional providers (Deacon, Marshal, and Master of Ceremonies for TLSCI for example), but will still have to manage education where there is no designated officer of responsibility and cover the material in education blocks not provided for by traditional lodge officer role. The WM and lodge still have a single point of responsibility and accountability, but more of the duties fall directly on the LEO in this model.

Worshipful Master Direction – This implementation involves the WM directing all educational activities personally. This would likely be the least effective model, but it would be well within the right of the WM to implement. The WM is a busy brother as it is; taking on the responsibilities for education across the formal education blocks in addition to his many other responsibilities would likely result in a partial implementation and reporting back to the lodge would likely be very limited. This model would result in the WM appointing brothers on a temporary or one-time basis to perform educational tasks, no measures of effectiveness, and no continuity in learning for brothers advancing from one educational block to the next.

One Brother (LEO) as a Point of Contact – This model consists of one brother, the LEO, appointed by the WM as a point of contact with no authorities or reporting responsibilities. The brother would eventually end up being the brother to hand out material to brothers and order educational materials from the Secretary. There would be virtually no measures of effectiveness of the lodge education efforts and no progress tracking for brothers moving through the educational blocks. Further, with no inherent authorities, the brother would have to work through other committees to provide support and ensure education needs are satisfied.

6. Delivery Methods

There are four main, broad categories of delivery methods for educational content – Live, Material, Non-material, and Mentoring. The type of content, sometimes combined with the most effective learning style of a brother, determines the most effective delivery, not the particular educational block. Also, LEO's or others charged with educating future and traveling masons must remember the basic truth that all people learn in ways unique to themselves; some people are visual, some learn through memorization, and others through performance. The educator must evaluate their audience and determine (as best as they can) which method, or combination of methods, will be the most effective to deliver the content in a particular

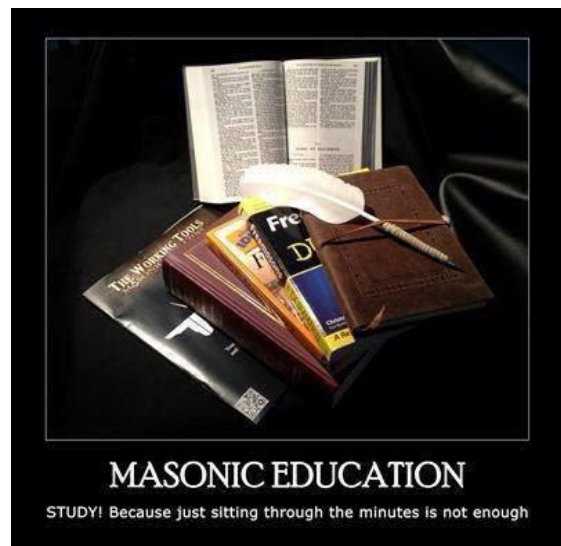


Figure 5 Masonic Education

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situation.

Live Delivery (Provided) – Live delivery, for the purpose of this manual, is defined as delivery through some type of program where there is a provider (i.e. speaker, instructor, etc.). This might be a program in the lodge room, a moderated round table discussion, or through hands-on or on-the-job training. Live delivery allows for interaction and for audiences to tease out material in an understandable way through questions. The Officer Leadership Training (OLT) and Secretary and Treasurer Schools in Texas are excellent examples of Live Delivery of material provided to a student or larger audience.

Live Delivery (“Student” Participation) – This method involves homework assignments that can be delivered by your “student” in the form of papers or talks delivered to the lodge. This is a very effective method to impart educational information because it places your student in an active “learning” role. This education can begin as soon a new mason is initiated and it is recommended that lodges seriously consider this option; if you build the search for knowledge into an EA’s masonic journey at the outset, you are laying a foundation of search and investigation upon which he will build his masonic journey. Habits developed early and reinforced throughout a mason’s career sets them up for a journey of search, discovery, and knowledge. The L.I.F.E. Program, A.L.L. Program, and Texas Briscoe Workshops are excellent examples of Live Delivery with student participation.

In whatever form you and your lodge implement an education plan, you can assign “homework” in the form of book reports, papers, or talks for the lodge. In fact, the notebook binder form of the Monitor of the Lodge is designed to allow the lodge to remove the FC and MM sections and provide the EA section to a new initiate for his reading. It is well within the purview of the lodge to task the EA to read that portion of the Monitor and report back to the lodge on what he has learned and his understanding of the content. In the current design of the Monitor of the Lodge, the lodge can add the FC portion of the Monitor to the book once the brother has received his FC degree and is ready to take on a reading assignment from that section.

Obviously this method can continue through the MM degree, but it does not need to end with the brother’s raising, nor does it need to be limited to the Monitor of the Lodge. Carl H. Claudy has written a series of excellent books that can become valuable parts of an education program. For EA’s, FC’, and MM’s, he has written “*Introduction to Freemasonry*” volumes 1 through 3 with volume one being the Entered Apprentice, volume 2 being the Fellowcraft, and Volume 3 the Master Mason. The books are short and can each be read in one day in straight-through reading if the candidate/brother desires. These readings would make excellent additions to the instruction given to the candidates and new brothers, especially if tasked to provide feedback to the lodge in the form of an oral book report or a paper.

This type of education should not need stop once a brother is raised. When a brother is selected for appointment to an office, there is no reason he cannot be asked to conduct some personal reading on the functions and responsibilities of the offices. Here again Carl H. Claudy provides an excellent source for this information in his book “*The Master’s Book*” which any lodge can require office holders to read.

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The lodge can also expect and task a prospective officer to provide a paper or a talk to the lodge based on his reading of this book.

These kinds of reading assignments can continue throughout all formal education blocks identified in this manual and are only limited by the imagination and desires of the lodge. The WM can formulate any type of reading assignment for anyone in the lodge coupled with any type of feedback to the brethren (paper, talk, etc). If a lodge sets up a program that includes this form of continuing education, and if it is instilled at the earliest moment of a young mason's journey (immediately after initiation), it becomes a natural part of the life of that lodge and it encourages brothers to continually seek light and impart light to his brothers.

Material Delivery – This method includes directed course reading such as pamphlets, and publications such as *The Monitor of the Lodge* and *The Grand Lodge Law Book*, and even personal reading. Lodges might benefit if they create a library, or update and modernize one they currently have and work it into a formal education plan. The LEO, or other education point of contact, should accumulate a reading list for brothers moving through the education blocks and make an effort to acquire recommended books for check-out by the brethren.

Non-material Delivery – There is also a wealth of material on the internet and on television (i.e. History Channel, A&E, Discovery Channel, etc.) that can supplement a lodge education plan, however, this material should not be encouraged for brothers in the Pre-Petition (I), Petition (II), or Degrees (III) Formal Education Blocks. LEO's that want to augment their education plans with internet and/or television material should attempt to view it before adding it to a lodge plan or course of education and assess its value, accuracy, and whether it may be good to stimulate discussion during lodge programs. Many television programs on cable are available on DVD and the LEO might consider adding some of these to the lodge library. Internet material can also (sometimes) be downloaded as and saved to disk, thumb drive, laptop, or tablet. It is also worth considering an E-Library; the LEO might acquire an electronic device such as a Kindle or tablet and compile an electronic library through Amazon, or other online book and media dealers that carry masonic media (i.e. movies, books, podcasts, etc.).

Mentoring – I called mentoring or mentorship out as a separate delivery method because of its criticality to the education process. Obviously it is a combination of live and non-material delivery and, occasionally, it also combines material delivery when used in some settings where material is used to support and enhance programs or presentations in individual or group settings.

It is **impossible to over-state the importance and centrality of mentoring** in our education processes. In a fraternal organization where knowledge is passed tongue-to-receptive ear, it is the most widely available, most widely employed, and potentially (if done properly) the most effective delivery method. When considering mentoring, most people automatically assume it is an intentional engagement with a student by an experienced, knowledgeable senior in a particular field, organization, fraternity, or career; unfortunately that is not always true. We have two types of mentoring: active (intentional) and passive (unintentional).

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Active (or Intentional) Mentoring – this is possibly the most effective method for delivering knowledge because a willing, experienced, and invested brother shares knowledge through discussions, demonstrations, and through his example.

Passive (or unintentional) Mentoring – this is the method that demands being called out separately because of the potential for lasting damage to our great fraternity. Behavioral mentoring is that mentoring that is received passively by a student (or, in our case a brother) new to the situation, be it a job, organization, or – as in our case – a fraternity. New brothers watch everyone for cues, things to do, things not to do, addressing brothers, addressing the lodge, volunteering, or not volunteering; the list is long. All brothers, (foot stomp), all brothers are mentors whether they intend it or not. We send intentional signals to new brothers, but most importantly we send unintentional signals that new brothers receive and internalize. A new brother will quickly begin to mimic behavior they see as acceptable and this education can have either a positive or negative effect. Unfortunately, many do not consider themselves to be mentoring as they go about their regular activities and interactions but education does occur – education on masonic protocols, laws, rules, respect, expectations, and so much more. Poor behavior by a few brothers around new masons can cause lasting damage to a lodge because those new brothers will eventually pass along what they’ve learned through their own activities and interactions. It is up to us to make sure that behavioral mentoring is a positive force in the lodge and in our interactions outside the lodge!

Every mason is an exemplar – for good or bad!



Figure 6 Value of a Leader

7. Centrality of Mentoring

We are a fraternity founded on an oral instruction principle and practice we refer to as “*from instructive tongue to the attentive ear*”. That’s a pretty good starting point for a discussion of mentoring in masonry. When you think more deeply about it, mentoring goes well beyond what we say and what we teach through verbal instruction and in discussing mentoring we are reminded that we are founded as an institution on teaching our successors through both our words and actions. Theoretically, we should be and should have the most effective mentors in the history of mankind, or at least as far back as the

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1300's and 1400's where we see references to [what are today] masonic traditions and practices. But are we serving as the most effective mentors possible?

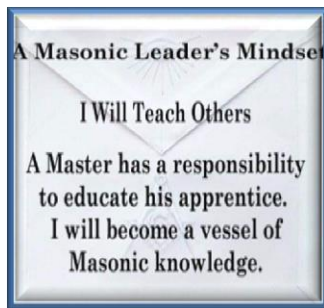


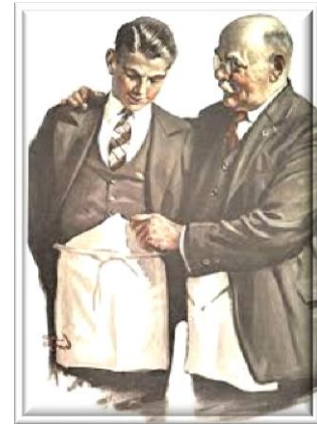
Figure 7 - Mindset

In the context of masonry, there are two forms of mentoring and they carry over into the non-masonic world as well. There is "active" mentoring which we do on purpose, and there is "passive" mentoring which we probably do not realize we are doing.

Active (or Intentional) Mentoring: this can be the most effective method for delivering knowledge because a willing, experienced, and invested brother shares knowledge through discussions, demonstrations, and through his example. The efficacy of this form is completely dependent on the experience and knowledge of the mentor and whether the information being shared is reasonably accurate, logical, and is also received, understood, and learned/retained by the candidate (or student).

Passive (or unintentional) Mentoring: this method demands being called out separately because of the potential for enduring good or lasting damage to our great fraternity. Passive mentoring is that mentoring that is received through observation by a student (or, in our case a brother) new to a situation, be it a job, organization, or – as in our case – a fraternity.

Every few years, a Grand Master, or maybe a lodge Worshipful Master, will be elected and mentoring will be one of his key "got to have" programs. And it will be treated as such; a program or maybe a checklist item. Mentors will be assigned and sent off to mentor their assigned protégé or protégé's. In another world or another time I would shy away from this and recommend against it. It tends to create forced relationships that can have an artificial feel to it among the mentor and mentee. But, two factors convince me to accept these situations and press ahead, and try to make the situation work for our fraternity. First, our system of candidate instruction in the catechisms lends itself to forming an initial bond for a new brother in the fraternity. A new candidate has a brother, his instructor, who he will get to know and hopefully form a bond with as too the instructor may also bond with his candidate. You frequently hear brothers bragging about brothers whom they instructed when they achieve some masonic milestone, and likewise you hear brothers talking admiringly about their instructors from "back in the day". Statements such as those indicate a bond between instructor and candidate formed and, in many situations, may remain intact. Second, we are an institution founded on passing knowledge from mouth to ear which is a central element (but not sole element) of mentoring. If anyone can make the concept of assigned mentors work, freemasons are certainly the ones to do it.



When it comes to assigning mentors, a Worshipful Master can and should do a few things to support and assist the brother or brothers he selects for this important work. First and most important, in

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addition to “go forth and help your candidate learn the ropes of the lodge and learn about masonry”, the Worshipful Master should set at least some achievable expectations and objectives so the brother has a clear picture of the types of things he should be doing. A Worshipful Master might, for example, tell the mentor that his candidate should learn at least one degree role, must be able to recite the “Charge to the Candidate” for all three degrees, should visit at least two other lodges, or possibly deliver one educational program at a stated meeting. The possibilities are almost boundless and are only limited by the current degree level of the candidate or mentee². The Worshipful Master should make sure the mentor knows he is to help his candidate with these tasks, not do them for him, and definitely not “*task and forget*” (meaning task the candidate and leave him on his own to figure it out).

The goal of mentoring is to help younger, less experienced masons and teach them! Clear objectives and clear expectations will help the new or inexperienced mentor understand his duties and meet the needs of the candidate and lodge. On the other hand, don’t bind the mentor into “here is your list, just do this”. Make sure the mentor knows that once he has established his relationship with his candidate or mentee, it is up to him to learn the new mason’s needs and interests and help where he can. The objectives provided by the Worshipful Master should serve as initial milestones or measures of progress the mentor can use to judge his own progress in his role and to spur further interest and questions by his candidate or mentee.

We can also help assigned mentors improve their skills by providing them specialized informative and educational material to help them build their knowledge base. We can make them aware of the dynamics of relationships so they understand how a young mason observes, interprets, and internalizes actions he observes (i.e. “Bro. Smith frequently whispers and holds ‘private lodge’ on the sideline during degrees, so this must be acceptable”). And we can remind and emphasize to our assigned mentors the concept of “leadership by example”; if there are things we want new masons to learn and do, it will be much easier to teach them if they see their instructors and mentors doing them.

If you boil down the theory of “assigned mentors” as normally implemented, it is essentially the desire of senior leaders to provide a type of a “first responder” for new masons, to spot problems, provide growing levels of education, demonstrate protocols, take them to other lodges to familiarize them with lodge visitation, and maybe point their mentees to good sources of educational material – all good and noble objectives. Assigned mentors may never establish a bond with his mentee that goes beyond the lodge relationship as natural mentors often form or already have with younger brothers, but that’s okay, especially if the assigned mentor is achieving positive results. In this scenario, an “assigned” mentor is actually serving in a role more accurately described as “tutor”, but you can still be sure the new mason is watching his teacher and learning from his mentor’s words and deeds (passive or unintentional mentoring). Does he gossip? Does he denigrate the Grand Lodge and/or Grand Lodge law? Does he demonstrate respect for his brothers and the officers of his lodge? The new mason will still learn much through this unintentional mentoring.

² Mentored person, someone who is mentored

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In my experience, the most effective type of mentorship is by natural mentors who actively pass experience, knowledge, and information through a direct relationship to a new or young mason. This differs from the directed mentorship in that the relationship stems from a natural bond of some sort between the mentor and mentee. This can be a friendship, a familial relationship, or some other personal association. It could well grow out of a friendship formed within lodge, but becomes a close, trusting relationship. It is also possible in this case the mentor has no idea that a brother trusts him and looks up to him as a brother to admire and who therefore is inclined to put a lot of weight in his words and deeds. Because this possibility exists, brothers should *always* consider that younger masons and candidates could be watching and listening closely to them for the elusive “light” they are told to seek. It is through these mentor-mentee relationships that the best education tends to flow because it is more likely it will be taken to heart and internalized by the mentee, student, candidate, or new mason.

New and prospective brothers watch everyone for cues and clues, things to do, things not to do, addressing brothers, how to address the lodge, volunteering or not volunteering for committees and duties; the list is long. All brothers (foot stomp) ALL brothers are mentors whether they intend it or not. We send intentional signals to new brothers, but most importantly we send unintentional signals that new brothers receive and internalize. A new brother will quickly begin to mimic behavior they understand and believe to be acceptable and this education can have either a positive or negative effect within a lodge.

Unfortunately, many do not consider or see themselves to be mentoring as they go about their regular activities and interactions but education does occur – education on masonic protocols, laws, rules, respect, expectations, and so much more. Poor behavior by a few brothers around new masons can cause lasting damage to a lodge because those new brothers will eventually pass along what they’ve learned through their own activities and interactions. If we are passing down poor protocols, and diluting them more and more with every generational passing, we will eventually lose all of the traditions that separate us from a frat house or other social club.

When I say everyone is a mentor, you might assume that I don’t really intend to include Entered Apprentice and Fellowcraft masons right? Wrong. *Everyone* is a mentor. If you are a member of a lodge that frequently initiates new masons, then you may find yourself and your lodge with several EA’s and FC’s working at any given time. You can be assured of two things: first, a brand new, newly-initiated EA will look to the other EA’s to gage their own progress and learn how they should be interacting with master masons, instructors, and lodge officers. Second, EA’s will also look to the FC’s who are working to see what they can learn about the path that lies ahead. With this in mind, instructors and mentors should be very pro-active in educating their candidates on not only their catechism’s, but on protocols, traditions, and lodge bylaws, rules, and regulations. Practices ingrained in a new mason while he is an EA and FC will stay with him his entire journey and other EA’s and FC’s will learn what is acceptable and what is expected through their observation of their fellow EA’s and FC’s and their interactions with master masons of the lodge.

We knocked upon the door seeking to join a distinctive organization, different than all of the options a man has to choose from such as veterans’ organizations, civic organizations, and even special interest

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associations. The fraternity we joined has no equal in terms of history, symbolism, and traditions. If we want to keep those things that make our great fraternity unique among all, then it is up to us to mentor our coming and subsequent generations appropriately and *effectively*. It is up to us to make sure that behavioral mentoring is a positive force in the lodge and in our interactions outside the lodge! How do we do that? It's really very simple. Here are three actions a Worshipful Master can take to assess the type of mentoring that is taking place among the brethren.

1. Talk to your EA's. Get to know them and find out their thoughts and opinions. Through these discussions you will learn directly from them who is influencing them (who are their natural mentors) and what knowledge and behaviors they are picking up.
2. Talk to your new master masons. Have good, lengthy conversations about their likes and dislikes, their thoughts on masonry, what they think of the degrees and work, and if they enjoy coming to lodge. If you have these discussions with new master masons, you will find out what catches their attention and what positive and negative influences are present in your lodge. Have they themselves identified any natural mentors? They may not call them that, but it could become apparent during your conversation(s), so be alert for clues.
3. Finally, look around and observe your lodge. Who's huddled with who, how the brothers are interacting, who are they interacting with. Do the brothers seem to be in good spirits and are they treating each other as brothers? Do brothers mimic actions and statements of other brothers?

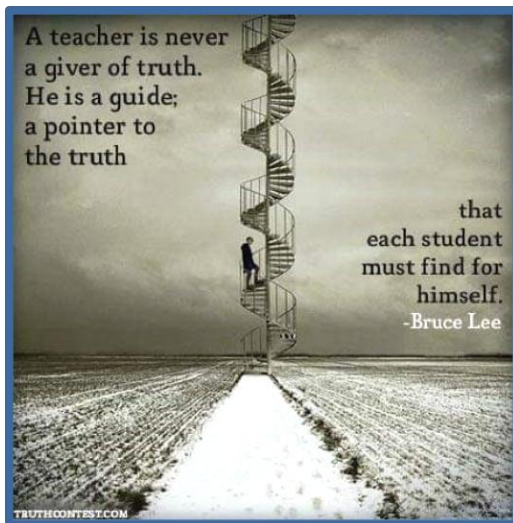


Figure 8 - The Teacher

Any Worshipful Master can gain a sense the quality of mentoring occurring among the members of his lodge using the three methods above. The attuned leader can determine to some degree the extent of both active and passive mentoring at play in the lodge and if the brethren are being mentored in a positive or negative direction. Armed with this information, the master can then determine what, if any actions are necessary to adjust the mentoring to gain more favorable results.

Mentoring is occurring in our lodges, either in an intended (active) or unintended (passive) fashion. With a basic awareness of the mentoring that is happening in his lodge, a Worshipful Master will be positioned to influence the types and quality of mentoring and manage

the effects. It is also crucial for a Worshipful Master to provide support to the brothers he may assign as mentors, setting at least some specific and achievable expectations and objectives to guide the mentor's efforts, and also provide educational resources and specialized materials for his mentor's knowledge and personal growth.

My personal bottom line on mentoring is this: *“mentoring should never be a completely passive process”*. If left to its own, with no human intervention, direction, or controls, mentoring might be almost completely ineffective in a best case situation, or, in a worst case, it may become an unguided force within a lodge, unleashing poor masonic protocols, poor discipline, and questionable educational material and information that is lacking in credibility, and value. It is up to us to take control – to the extent possible – of the mentoring in our lodges and ensure it is a positive and effective element benefiting our lodges and masonry into future generations!

8. Implementing Actions, Material and Programs

Implementing Actions – A LEO or other program overseer can simply start providing material to brothers and making progress reports to the lodge, but it is a good idea to take some time at the beginning to organize the program, define the implementation (according to Section 5 above), and document the specific implementation, desired outcome, and how the program will be evaluated (measures of success).

Organize – basic planning includes a “first step” common to most efforts. Sometimes this step is called “planning to plan”, sometimes it’s “organize”, and some use the catchy “planning for success” to name this step. Here, you will consider what your goal or objective is. Once you are comfortable you know and understand your objectives, you can research your required steps, tasks, and sub-tasks that must be accomplished to achieve this goal. The most common method to do this is sometimes called “backward planning” or “reverse engineering”, but in the military it is known as “Strategy-to-Task Analysis” and you can research this online and in printed publications if you would like to learn more details.

Once you understand your objective, you can describe to yourself what that “completed” state looks like and then visualize how that state was created. That analysis will tell you what actions (tasks) need to occur, and what order you need to perform them (steps). You should actually draw this out on paper or a white board so you can see your process as it is defined. This manual should provide you some options and some ideas to implement an education plan in your lodge, so you just need to put order to the sequence of actions you need to accomplish. Write it down! When you want to report to the brethren, a written plan provides something the brethren can understand, vote, and approve. At this point, you should have your objective, the steps needed to get to the objective, and the tasks needed within each step to ultimately achieve the objective.

Typically, plans will layout the general plan along a timeline, broken or defined according to the steps and tasks with a written description of each element (tasks, steps, objective) of the plan. You should compile your plan and present it to the lodge (if required) either as a plan, or perhaps as a concept paper.



Figure 9 Trestleboard - Planning

Obtain Necessary Resources – Once you can visualize your steps and tasks, you can start identifying the resources you need to accomplish each task – educational material, use of the lodge, media, etc. You should physically obtain your materials and get them under your control. We recommend an inventory list organized by Formal Education Block so that you can be prepared as brother's move from one block to the next. Your inventory list will serve you well, helping you track the use of your materials, order new or replacement materials as needed, and report to the lodge on the costs and expenditures on educational material.

Estimate Timelines – You should create an estimated timeline for either the full plan or for each block so you have some way to track progress. This is particularly important in Blocks III (Degrees), IV (New Master), and VI (Officer) where there are specific deadlines for completing certain courses or readings.

Develop Curriculum or Syllabus (Optional) – We recommend you compile a curriculum *or syllabus* to provide to brothers so they will know what is expected of them as they progress through their educational journey. You may find it useful to create a curriculum or syllabus for each Formal Education Block.

List Participants – You can do this in any number of ways. One way would be to get a roster of members of the lodge and determine which brothers are (or would be) in which Education Blocks, or use a sign-up sheet and assign brothers to Education Blocks as appropriate, or perhaps another way all together. If you are the LEO, it's probably a good idea to know the status of everyone on the membership role. Once you have the list, you can track brothers from start date, from Education Block, or any other manner you like.

Identify Speakers, Educators – Develop a list of speakers or others who might teach some lessons or run some programs. Once you have this list, confer with those individuals and assign them to specific assignments. They will want to know when, how often, and other things, so be prepared to negotiate and come to agreements. You're only limited here by your imagination; you can reach out to other lodges, District Deputies, other bodies (York Rite, Scottish Rite, Commandery, Shrine, etc).

Build a Program Book – Now you've written a plan, inventoried your resources and materials, developed timelines, curriculums, and lists of participants and speaker, so your next step should be to put it all together in a Program Book. Organize it, tab it out, and label it and you now have a guide that

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you can hand off to your successor! Plus, if the Worshipful Master wants an update, or asks you to brief the lodge, you have everything at your fingertips.

Set Implementation Date – With all of the parts of your program now compiled and organized, you are ready to set an implementation date. Based on your timelines and other factors you identify as you developed your program, select your proposed implementation date and draw out your first schedule.

Report to the Lodge – You are ready to start, so it's time to report to the lodge. Take your Program Book and make your report to the lodge and request lodge approval to commence on your proposed start date. It is highly recommended you also submit a written report with all of the pertinent "Who, What, Why, When, and How" documented for the lodge and inclusion at some point in the Lodge History.

9. An Example of a Simple Program

A Simple Baseline Program – Many lodges only require a simple program, but some may want to design a more advanced, continuing program. In either case, there is a simple baseline program that you can enact that will target the key learning period for a new Mason and provide a foundation on which you can build that larger, continuing education program. This program targets prospective and new masons going through education blocks I (Pre-Petition) and IV (New Master).

Pre-Petition Block – A typical "pre-petition" scenario that many lodges encounter is a curious man visits the lodge to inquire about masonry. Many lodges appoint an official "greeter" who will be in charge of greeting and conducting an initial interview. These situations typically include questions and answers and a walking tour of the lodge building and lodge room. The lodge officer in charge of education should determine what information should be imparted to every "walk-in" and/or other men curious about masonry and then provide a standard package or list to greeters and other members who frequently field questions from the public. This early information will determine whether a man requests a petition so the information must be accurate and credible. Obviously the curious visitor will drive most of the meeting with questions, but the lodge should determine a minimum baseline of information they want to ensure every questioner receives and then ensure that information is provided consistently to every questioner. The lodge and the "greeter" could develop a standard script or merely develop a list of key talking points.

Petition Block – The Petition Block is the period of time between the time a petition is submitted and the time the candidate is initiated

- Impart educational information to a petitioner during the candidate investigation. The Investigating committee members should present educational material to the petitioner and his family during the course of the investigation interview. This is an opportunity to begin imparting important information to the petitioner about masonry and to provide initial education to the petitioner's family. The lodge officer responsible for education should decide what information should be delivered during the interview and then task each investigation committee to ensure that material is covered in the

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course of the interview. The lodge should develop a list of talking points and perhaps some short scripts the investigating committee can take with them on their interview.

- The candidate's first book of the Texas Lodge System of Candidate information (TLSCI) is presented. **This book is to be presented to the candidate who is elected to receive the degrees as soon as possible after the ballot is taken.** This book should be delivered to the candidate at the lodge in enough time for him and his family to read and discuss it before his initiation in the EA degree.

Degree Block – The degree block predominantly encompasses the Entered Apprentice and Fellowcraft degrees.

EA Degree:

- First, the new EA must receive the EA book of the TLSCI immediately after initiation
- Next, the new EA is given the EA section of the Monitor of the Lodge and tasked with a reading (homework) assignment. The lodge can determine the assignment, whether a verbal, summary report to the lodge, a paper that discusses his thoughts or understanding of the reading assignment, or some other report to the lodge based on the EA section of The Monitor. The EA should be tasked to have this completed before he requests to turn in his proficiency. The Monitor is now provided in a form where the lodge can acquire the book and remove the FC and MM sections and hold them until the candidate advances while they give him the book with the EA section.
- The candidate is tasked to read "Introduction to Freemasonry Volume 1: Entered Apprentice" by Carl H. Claudy and provide a report to the lodge either prior to turning in his proficiency or together with his proficiency. This can also be a written paper or an oral report and it can either be a summary of the reading, a task to address a specific point in the book, or a task to report on what strikes the candidate most significantly.

FC Degree:

- The candidate is provided the FC book of the TLSCI immediately after his FC degree.
- The lodge provides the FC section of The Monitor of the Lodge along with an assignment
- The candidate is tasked to read "Introduction to Freemasonry Volume 2: Fellowcraft" by Carl H. Claudy and is tasked with a reading assignment

New Master Block – The New Master block covers a specific time frame that runs from the time of the new Master Mason's raising to the time he completes his required instruction and education.

- The new Master Mason is provided the Master Mason book of the TLSCI
- The new Master Mason is provided his materials and instructions for the Additional Lodge Light (A.L.L.) Program

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- The new Master Mason is provided the remaining section of The Monitor of the Lodge and tasked with an assignment due to the lodge, prior to his proficiency submission

- The new Master Mason is tasked to read “Introduction to Freemasonry Volume 3: Master Mason” by Carl H. Claudy and to provide a report of the lodge’s design back to the lodge before or in conjunction with his Master Mason proficiency.

10. Educating the Family – What? When?

Educate the Whole Family. When developing your education plan and program for your lodge, do not forget the families of your candidates and petitioners! If you want the support and involvement of the families of the brethren of your lodge, you owe them information and education on what Freemasonry is, what it means, and what it offers.

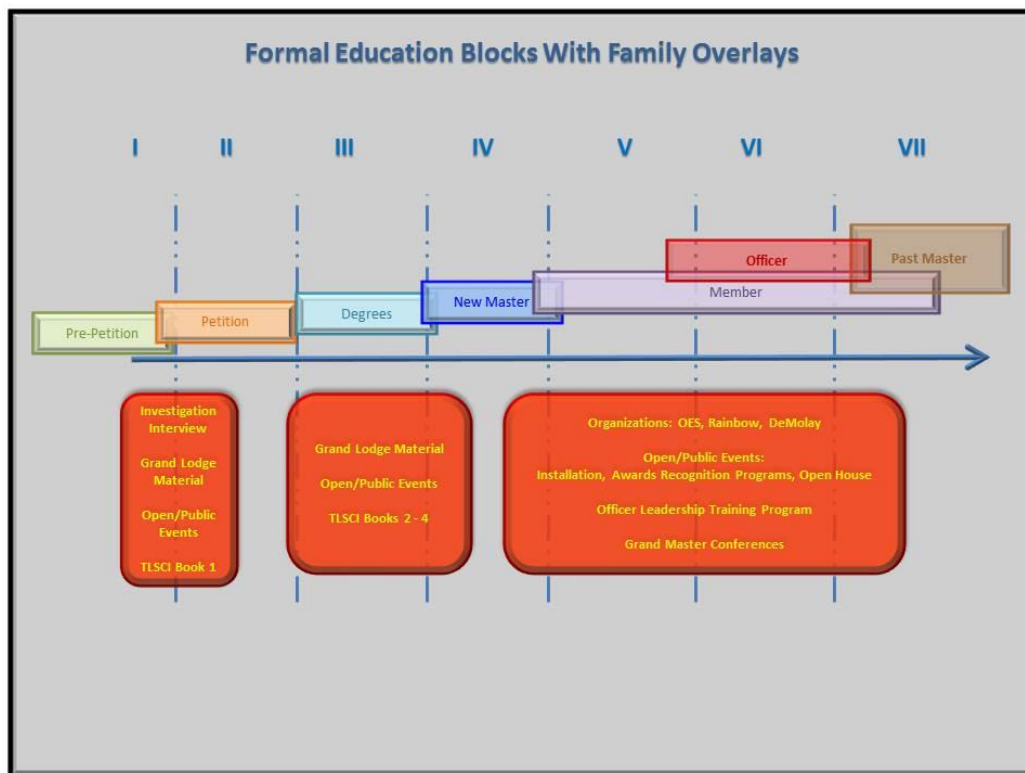


Figure 10 - Formal Education Blocks with Family Overlays

Pre-Petition & Petition Blocks – In these blocks we introduce the family to Freemasonry. First, we interview every petitioner and ideally we go to their homes to do that. The interview provides an ideal

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opportunity – perhaps the first – to provide educational information directly to the family of a petitioner. Lodges might consider formulating a set “lesson” that at least one member of the Investigation Committee can deliver to the family during the session. Next, we give every candidate elected to receive the degrees his first book of the Texas Lodge System of Candidate Information (TLSCI) and the candidate should be encouraged to have his family read it as well. They in fact can read any such material we provide to a candidate or mason that is printed in clear text. Finally, they should be invited to any open/public lodge events to experience the family aspect of the fraternity and those events can be used to provide education (as may be appropriate based on the time and the event).

Degrees & New Master Blocks – These blocks are important blocks for integrating the family into the Lodge and educating them on exactly what Masonry is, what it is not, and what it means for their spouse or family member who is completing his degrees. The EA and FC books 2 of the TLSCI are crucial to the education of our new Mason’s families. They should be encouraged to read every book in turn as they are provided to our candidates/new Master Masons. These books should be supplemented with additional Grand Lodge material and further open/public events. If the candidate has children that are within the age limits of our youth groups, the lodge may want to provide the families information on the Rainbows and/or the DeMolay to stimulate their imagination and thinking.

New Master, Member, Officer, & Past Master Blocks – These blocks are where the families are fully integrated into the Masonic family and fraternity. After we raise our new Master Mason, the family may be ready to consider our Appendant Organizations. The Order of the Eastern Star (OES) provides an ideal vehicle for the new Master Mason’s spouse to participate in a Masonic organization with their loved one while continuing their own education. The same applies to the children and the Masonic Youth Groups; by joining the Rainbows or DeMolay, their father can participate as board members while the son or daughter begins an educational journey of their own. The OES, Rainbows, and DeMolay have their own educational and instructional programs that complement the education our Master Masons are (or should be) receiving in Lodge. See the “*Family Education Resource and Education Block Chart*” on the next page for education source material for family members, including Grand Lodge information on Appendant Organizations.

We should be encouraging our candidates and new Master Masons to attend Grand Master’s Conferences and now that they are raised, we should be encouraging them to invite their families to join in the event (when they are open to families). These conferences can be very educational and provide valuable insight into Masonry by way of the themes and messages of our Grand Masters.

The Grand Lodge of Texas Committee on Masonic Education and Service holds several Officer Leadership Training (OLT) sessions every year, usually in July, August, and September, and they do include a spouses’ curriculum composed of several sessions. In these sessions, the committee members provide specific instruction on Masonic topics such as lodge operations, officers’ duties & responsibilities, the Grand Lodge, and Masonic Protocols. This is an excellent venue for spouses to receive quality masonic education.

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We know that new, younger Masons are looking for things to do where they can include their families. It is incumbent on us to provide education to our members' families to bring them in and make them feel a part of the life of the Lodge and of their spouse's Masonic journey. A well-rounded and inclusive education program for the families will help our members as they work through their 24-inch gauge considerations as their families become interested and active participants along the path of their journey instead of competitors for their time and attention.

Family Education Resource and Education Block Chart

Blocks	Source	Location/URL	Notes
I & II	Investigation Interview	Petition's Home	Pre-Plan Education
	Open/Public Events	At Lodge, or in Public	
	Grand Lodge Material	grandlodgeoftexas.org (website)	URL subject to change
	TLSCI First Book	Book, provided by Lodge	Once elected for degrees
III & IV	Grand Lodge Material	grandlodgeoftexas.org	URL subject to change
	Open/Public Events	At Lodge, or in Public	
	TLSCI Books EA, FC, & MM	Books, provided by Lodge	As candidate progresses
V, VI, & VII	Open/Public Events	At Lodge, or in Public	
	Grand Master Conferences	As Designated by the Grand Master	When open to family
	Officer Leadership Training	As Provided by Education Committee	
	Appendant Organizations:		
	1. Grand Lodge Info	https://grandlodgeoftexas.org/appendant-organizations/	Grand Lodge Info
	2. Eastern Star	https://grandlodgeoftexas.org/appendant-body/order-of-the-eastern-star/	Grand Lodge Info
		http://www.easternstar.org/	National Info
	3. Rainbow for Girls	https://grandlodgeoftexas.org/youth-organization/rainbow-for-girls/	Grand Lodge Info
		https://www.gorainbow.org/	National Info
	4. DeMolay	https://grandlodgeoftexas.org/youth-organization/demolay/	Grand Lodge Info
		https://demolay.org/	National Info

11. Tracking

It could be very beneficial to the lodge to track the education status of their members. Questions come up – especially in regards to qualification for advancement to Worshipful Master – as to whether brothers have completed required training and when. Occasionally questions arise as to how many and which brothers hold Instruction Certificates. I have provided a sample template in Appendix V that would allow a Lodge Education Officer or Secretary track required education milestones and certificates.

12. Conclusion

This manual should be complete enough that an LEO or lodge member can take it and implement an education program for his lodge. It should also be flexible enough that a LEO or lodge member can implement a modified or customized system, tailored to his particular lodge needs. Each lodge *is unique* and their needs are usually very different and I hope this manual can serve the lodges as a foundation and a starting point in designing education plans.

I offer the following forums to find my other material and thoughts and opinions on masonic matters:

Website:

“A Mason’s Journey” – My online site for sharing and storing my papers, posting blog entries, and publishing papers by other masonic writers - www.amasonsjourney.com

FaceBook:

“BroBill’s Masonic Education Group” – A private FaceBook for sharing masonic material and educational information - <https://www.facebook.com/groups/brobillsmasoniceducationgroup>

“A Mason’s journey” – My personal FB blog that serves as a companion to my “A Mason’s Journey” website - <https://www.facebook.com/AMasonsJourney>

Several Appendices provide additional material and amplify certain sections of this program manual.

Prepared By:

Bro. William H. Boyd, PM, Valley-Hi Lodge #1407
September 1, 2021

APPENDIX INTRODUCTION

The appendices that follow provide the Lodge options for providing educational materials to members as they progress in their masonic journey. They provide essentially the same (or very similar) information laid out in a variety of groupings and organizations to allow the Lodges to choose an educational sequence that aligns best with their chosen educational program. In Appendix 1 I provide the "Formal Educational Blocks" identified through my Educational Needs Analysis and that Lodges can use as a baseline in educational progression. Once a lodge reviews the appendices, they can decide which groupings and organization of educational materiel best suits their need.

In the final appendix, I provide a sample template that a Lodge might use to document and track a member's educational progression. It is designed in such a way as to allow a lodge to begin tracking educational progress from the time a prospective petitioner first asks about masonry and provides the lodge a record from which they can follow-up with that prospective petitioner. This template therefore allows a lodge to track a member's education from the time they petition and throughout their journey while documenting their educational history.

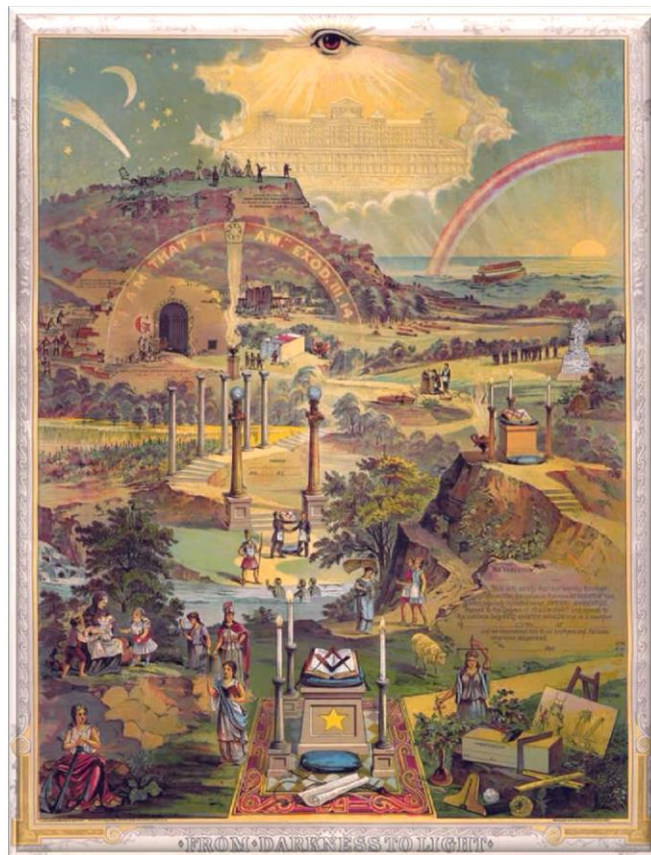


Figure 11 The Journey

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APPENDIX 1 – Formal Masonic Education Blocks with Content Integration

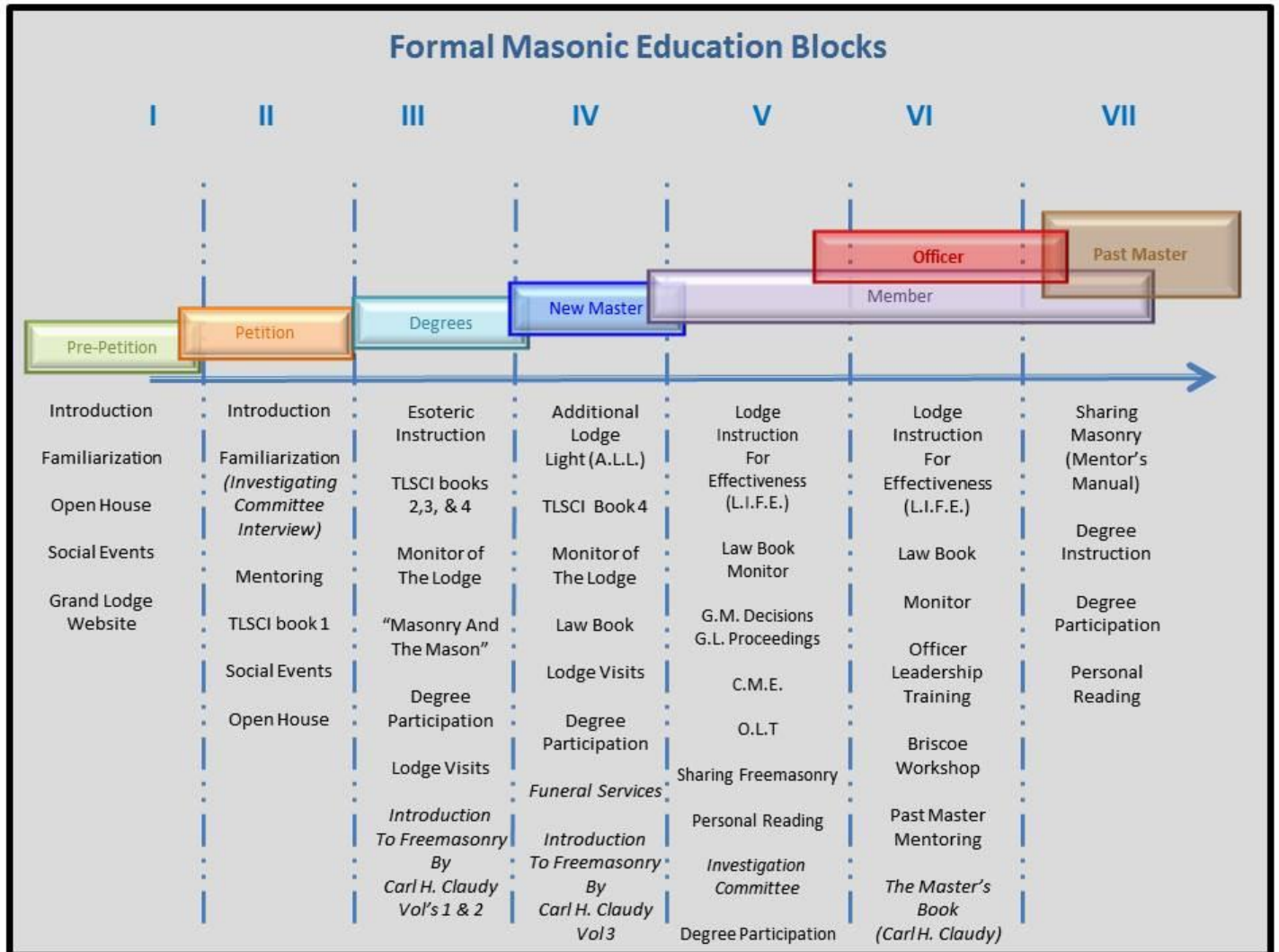


Figure 12 Formal Masonic Education Blocks with Content Integration

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APPENDIX II – Education Program Blocks and Material Suggestions

This Appendix will provide required material and some suggested material for each Formal Masonic Education Block

Formal Masonic Education Block I – Pre-petition

Formal Masonic Education Block I – Pre-Petition		
Required	Suggested	Notes
	Open House/Lodge Tour	Tours, Q&A, & Videos
	Social Events	Social Interaction, Q&A
	Grand Lodge Website	
	Grand Lodge Material	Pamphlets, Between Friends, etc

Formal Masonic Education Block II – Petition

Formal Masonic Education Block II – Petition		
Required	Suggested	Notes
Investigation	Mentoring	Use opportunity to inform
First TLSCI Book (Candidate)	Social Events	Once Balloted and Elected
	Open House	Tours, Q&A, & Videos
	Grand Lodge Information	

Formal Masonic Education Block III – Degrees

Formal Masonic Education Block III - Degrees		
Required	Suggested	Notes
TLSCI Books (EA & FC)	Monitor of the Lodge	Degree-Appropriate Chapter
Esoteric Instruction*	Masonry and the Mason	
	Lodge Visits	Observe Degrees – Hear Lectures
	Degree Team Participation*	
	Grand Master Conferences	
	Introduction to Freemasonry	Carl H. Claudy – Volumes 1 & 2

* Under the purview of the Grand Lodge of Texas Committee on Work



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Formal Masonic Education Block IV – New Master

Formal Masonic Education Block IV – New Master		
Required	Suggested	Notes
TLSCI Book (Master Mason)	Monitor of the Lodge	Lodge Procedures & Ceremonies
Additional Lodge Light Program	Grand Lodge Law Book	Charges of a Freemason Pg. 30
	Lodge Visits	
	Degree Participation*	
	Grand Master Conferences	
	Grand Lodge Annual Comm.	
	A Pilgrim's Path; One Man's Road	John J. Robinson
	Introduction to Freemasonry	Carl H. Claudy – Volume 3

**Under the purview of the Grand Lodge of Texas Committee on Work*

Formal Masonic Education Block V – Member

Formal Masonic Education Block V - Member		
Required	Suggested	Notes
	L.I.F.E. Program	Recommended Mandatory
	Grand Lodge Law Book	Title I – The Grand Lodge
	Grand Master Decisions	
	Grand Lodge Proceedings	At least to a “familiarity” level
	Continuing Masonic Education	Via Scottish Rite Education Pgm.
	Sharing Freemasonry	
	Personal Reading	From Reading List
	Officer Leadership Training	Recommended Mandatory
	Degree Participation*	
	Grand Master Conferences	
	Grand Lodge Annual Comm.	

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Formal Masonic Education Block VI – Officer

Formal Masonic Education Block VI - Officer		
Required	Suggested	Notes
Officer Leadership Training	L.I.F.E.	Recommend both L.I.F.E & O.L.T.
L.I.F.E. (if no O.L.T. Attendance)	Grand Lodge Law Book	Front to back
	Briscoe Workshop	DEO or Education & Services Cmt
	Past Master Mentoring	
	Monitor of the Lodge	Lodge Procedures & Ceremonies
	Grand Lodge Annual Comm.	
	Grand Master's Conferences	
	The Master's Book	Carl H. Claudy
	The Principles of Masonic Law	Albert G. Mackey
	Grand Lodge Secretary's School	

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Formal Masonic Education Block VII – Past Master

Formal Masonic Education Block VII – Past Master		
Required	Suggested	Notes
	Sharing Freemasonry	Mentor's Manual
	Degree Instruction*	
	Candidate Instruction*	
	Personal Reading	From Reading List
	Grand Lodge Annual Comm	
	Grand Master's Conferences	
	The Principles of Masonic Law	Albert G. Mackey
	The Symbolism of Freemasonry	Albert G. Mackey
	The Lost Keys of Freemasonry	Manly P. Hall
	Millennial Apprentices: The Next Revolution in Freemasonry	Samuel Friedman

* Under the purview of the Grand Lodge of Texas Committee on Work



Figure 13 Bro. George Washington - Knowledge

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Appendix III – Source-to-Block Cross Reference

This appendix cross references some specific sources to suggested Formal Masonic Education Blocks.

The Law Book –

Law Book of the Grand Lodge of Texas		
Section	Suggested Block	Notes
Charges of a Freemason	Block IV – New Master	
Title I – The Grand Lodge	Block IV – New Master	
Title II – Subordinate Lodges	Block V – Member	
Full Book – Front to Back	Block VI – Officer	Complete by end of Sr. Deacon

Monitor of the Lodge –

Monitor of the Lodge *		
Section	Suggested Block	Notes
Degree Appropriate Chapter	Block III – Degrees	Recommend “homework”
Lodge Procedures & Ceremonies	Block IV – New Master	

* The Monitor of the Lodge is bound by a 3-ring binder that allows a lodge to provide an EA the EA section of the book, and then deliver each successive section as the candidate receives his degrees

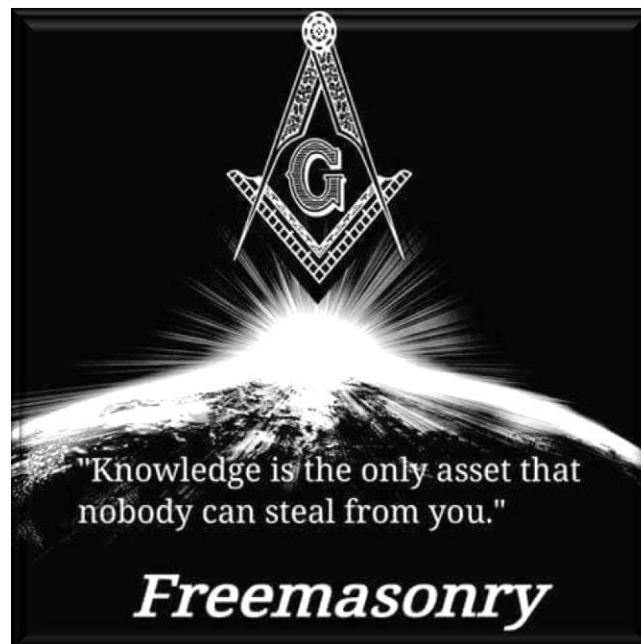


Figure 14 Knowledge

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Various Sources – to – Blocks –

Various		
Source	Suggested Block	Notes
T.L.S.C.I. Books (Can, EA – MM)	II Petition & III Degrees Blocks	Provided incrementally – Req'd
Freemasonry and the Mason	III Degrees	
Introduction to Freemasonry	III Degrees	Carl H. Claudy (Vol's 1 & 2)
Introduction to Freemasonry	IV New Master	Carl H. Claudy (Volume 3)
Additional Lodge Light (A.L.L.)	IV New Master	Required
A Pilgrim's Path; One Man's Road	IV New Master	John J. Robinson
A Pilgrim's Path; Freemasonry and the Religious Right	IV New Master	John J. Robinson
L.I.F.E.	IV New Master or V Member	
Grand Master Decisions	V Member or VI Officer	Complete by end of Sr. Deacon
Grand Lodge Proceedings	IV New Master or V Member	
Officer Leadership Training (OLT)	V Member	(Former Warden's Retreat)
Sharing Freemasonry	V Member	(Mentor's Manual)
Lodge Officer Manual	V Member or VI Master	GLOt Publication
The Master's Book	VI Officer	Carl H. Claudy
Lodge Visits	III Degrees – VII Past Master	
Degree Participation	III Degrees – VII Past Master	
Continuing Masonic Education	V Member – VII Past Master	Not available Statewide
Grand Master Conferences	III Degrees – VII Past Master	
Grand Lodge Communication	IV New Master – VII Past Master	Annual Grand Lodge Comm.
Masonic Funeral Service	V Member	
The Principles of Masonic Law	VI Officer & VII Past Master	Albert G. Mackey
The Symbolism of Freemasonry	VII Past Master	Albert G. Mackey
The Lost Keys of Freemasonry	VII Past Master	Manly P. Hall
Millennial Apprentices: The Next Revolution in Freemasonry	VI Officer & VII Past Master	Samuel Friedman

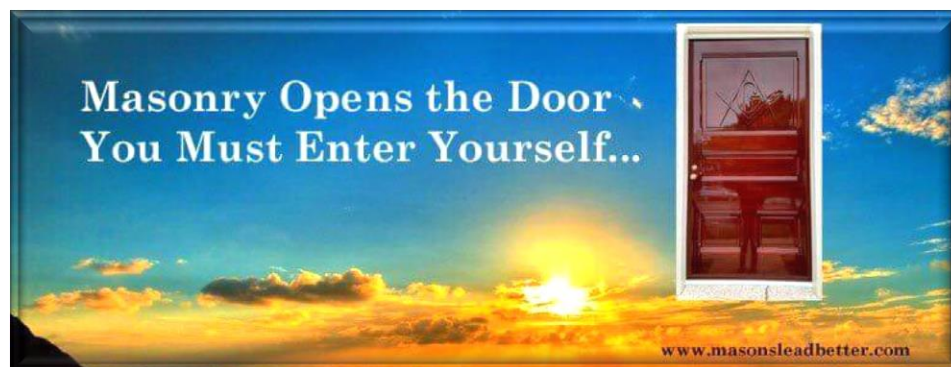


Figure 15 Masonry Opens the Door

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Commercial and Media Recommendations, Cross Referenced to Blocks -

Commercial and Media Recommendations		
Source	Suggested Block	Notes
Ancient Manuscripts of the Freemasons	V. Member; VII. <i>Past Master</i>	By Michael R. Poll
Morals & Dogma	V. Member	By Albert Pike
The Master's Book	VI. Officer; VII. <i>Past Master</i>	By Carl H. Claudy
Introduction to Freemasonry	III. Degrees	By Carl H. Claudy – Vol's 1 & 2
Introduction to Freemasonry	IV. New Master	By Carl H. Claudy – Volume 3
Anderson's Constitutions of 1723	V. Member	By Masonic Service Association
Anderson's Constitutions of 1738	V. Member	By James Anderson and W.J. Hughan
A Pilgrim's Path; One Man's Road	V. Member	By John J. Robinson
A Pilgrim's Path; Freemasonry and the Religious Right	V. Member	By John J. Robinson
I Just Didn't Know That	V. Member; VII. <i>Past Master</i>	By Rev. Neville Barker Cryer
Famous American Freemasons	V. Member; VII. <i>Past Master</i>	By Todd E. Creason (Vol's 1 & 2)
House Undivided	V. Member; VII. <i>Past Master</i>	By Allen E. Roberts
The Better Angels of our Nature	V. Member; VII. <i>Past Master</i>	By Michael A. Halleran
Freemasonry in American History	V. Member; VII. <i>Past Master</i>	By Allen E. Roberts
Revolutionary Brotherhood	V. Member; VII. <i>Past Master</i>	By Steven C. Bullock
The Liverpool Masonic Rebellion and the Wigan Grand Lodge	V. Member; VII. <i>Past Master</i>	By David Harrison
Mackey's Encyclopedia of Freemasonry	V. Member; VII. <i>Past Master</i>	By Robert Ingham Clegg (Revised Mackey's Encyclopedia)
Lexicon of Freemasonry	V. Member; VII. <i>Past Master</i>	By Albert G. Mackey
Is It True What They Say About Freemasonry?	VII. <i>Past Master</i>	By Art DeHoyos & S. Brent Morris
The Red Triangle; A History of Anti-Masonry	V. Member; VII. <i>Past Master</i>	By Robert L.D. Cooper
Morgan; The Scandal That Shook Freemasonry	V. Member; VII. <i>Past Master</i>	By Stephen Dafoe
Coil's Masonic Encyclopedia	VII. <i>Past Master</i>	By Henry Wilson Coil & William Moseley Brown
The Principles of Masonic Law – A Treatise on the Constitutional Laws, Usages, and Landmarks of Freemasonry	VI. Officer; VII. <i>Past Master</i>	By Albert G. Mackey
The Symbolism of Freemasonry	VII. <i>Past Master</i>	By Albert G. Mackey
The Lost Keys of Freemasonry	VII. <i>Past Master</i>	By Manly P. Hall
Millennial Apprentices: The Next Revolution in Freemasonry	VII. <i>Past Master</i>	Samuel Friedman

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Appendix IV – Source Progression (Ordered Reading List)

Ordered (Suggested) Reading List		
Education Block	Title/Description	Author/Notes
Pre-Petition	Grand Lodge Material	Grand Lodge of Texas
	Grand Lodge Website	Grandlodgeoftexas.org
Petition (After reading)	Grand Lodge Material	Grand Lodge of Texas
	Grand Lodge Website	Grandlodgeoftexas.org
	TLSCI Book (Candidate Elected to Receive the Degrees)	Grand Lodge of Texas
Degrees	TLSCI Books (EA and FC books)	Grand Lodge of Texas
	Introduction to Freemasonry Volumes 1 & 2	Carl H. Claudy
	Monitor of the Lodge EA & FC Chapters	Grand Lodge of Texas
New Master	TLSCI Book (Master Mason)	Grand Lodge of Texas
	Additional Lodge Light (A.L.L.) Program	Grand Lodge of Texas
	Monitor of the Lodge MM Chapter	Grand Lodge of Texas
	Grand Lodge of Texas Law Book	Charges, Title I & Title II
	Introduction to Freemasonry Volume 3	Carl H. Claudy
Member	Sharing Freemasonry	(Mentors Manual)
	L.I.F.E. Program	
	Grand Master's Decisions, Law Book	
	Lodge Officer Manual	Grand Lodge of Texas
	Grand Lodge Proceedings	Grand Lodge of Texas
	Ancient Manuscripts of the Freemasons	Michael R. Poll
	A Pilgrim's Path; One Man's Road to the Masonic Temple	John J. Robinson
	A Pilgrim's Path; Freemasonry and the Religious Right	John J. Robinson
	Anderson's Constitution of 1723 & 1738	James Anderson & W.J. Hughan
	I Just Didn't Know That	Rev. Neville Barker Cryer
	Famous American Freemasons (Volumes 1 & 2)	Todd E. Creason
	House Undivided	Allen E. Roberts
	The Better Angels of our Nature	Michael A. Halleran
	Revolutionary Brotherhood	Steven C. Bullock
	Freemasonry In American History	Allen E. Roberts
	The Liverpool Masonic Rebellion and the Wigan Grand Lodge	David Harrison
	Principles of Masonic Law – Treatise on Constitutional Laws	Albert G. Mackey
	Is It True What They Say About Freemasonry?	Art DeHoyos & S. Brent Morris
	Lexicon of Freemasonry	Albert G. Mackey
	The Red Triangle; A History of Anti-Masonry	Robert L.D. Cooper
	Morgan; The Scandal that Shook Freemasonry	Stephan Dafoe
Officer	Grand Lodge of Texas Law Book /Grand Master's Decisions	Front to back
	The Master's Book	Carl H. Claudy
	Principles of Masonic Law – Treatise on Constitutional Laws	Albert G. Mackey
	L.I.F.E. Program	Required for progression
	Monitor of the Lodge	Front to back
Past Master	All material from Member & Officer Blocks	
	Mackey' Encyclopedia of Freemasonry	Albert G. Mackey
	The Symbolism of Freemasonry	Albert G. Mackey
	Coils Masonic Encyclopedia	Henry Wilson Coil & W. Brown
	Millennial Freemasonry: The Next Revolution in Freemasonry	Samuel Friedman

Appendix V – Member Education Record Template

I have placed the template on its own page (following) so that you can print it out and make copies if you like.

This is just a template that you can either use as is, or use it to provide ideas for your own record. This template is laid out in such a way as to capture information that is either used or requested on occasion and to give the officers of a lodge information on a prospective officer to determine eligibility for advancement through the top three chairs (as required by GLoT Form 101).

Line 1 – Line 1 is the brother’s name and a date. You can use either the date you began entering information on the record, or you can use the earliest date of the entries you will be entering. This date block is for your convenience, to be used in whatever system you are setting up.

Block Name/Number & Block Start Date – These fields are used for tracking the progression of a brother through the defined Formal Masonic Education Blocks. The intent of the Block Start Date column is to capture the date a brother begins or enters that block. As I designed the form, I didn’t see a need to have any type of closure date, especially since many blocks overlap and the Member (Block V) and Past Master (Block VII) blocks never end.

Specialty Education & Date – This column is intended to capture any special education events or functions. I placed “Secretary Training School” in the top block as an example, but you can include Briscoe Workshops, or other events you deem important. Many lodges may have their own education requirements that can be documented in these columns.

Required Courses & Date Completed – This column speaks for itself. This is where a lodge documents where a brother achieves a required educational milestone.

Instruction Certificate & Date Achieved – It is true that I have avoided intruding into the area of formal instruction which falls under the purview of The Grand Lodge of Texas Committee on Work, but I believe it would be convenient for a lodge to have this information at their fingertips. Since this entire form is optional, these fields then are absolutely discretionary for lodges.

I hope this template is of use or provides some ideas for how to track your education data and brothers’ status. If your lodge is implementing a formal education program, you will find it useful to organize the progress and milestone data for quick reference.

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APPENDIX VI – Formal Masonic Education Blocks with Family Overlay

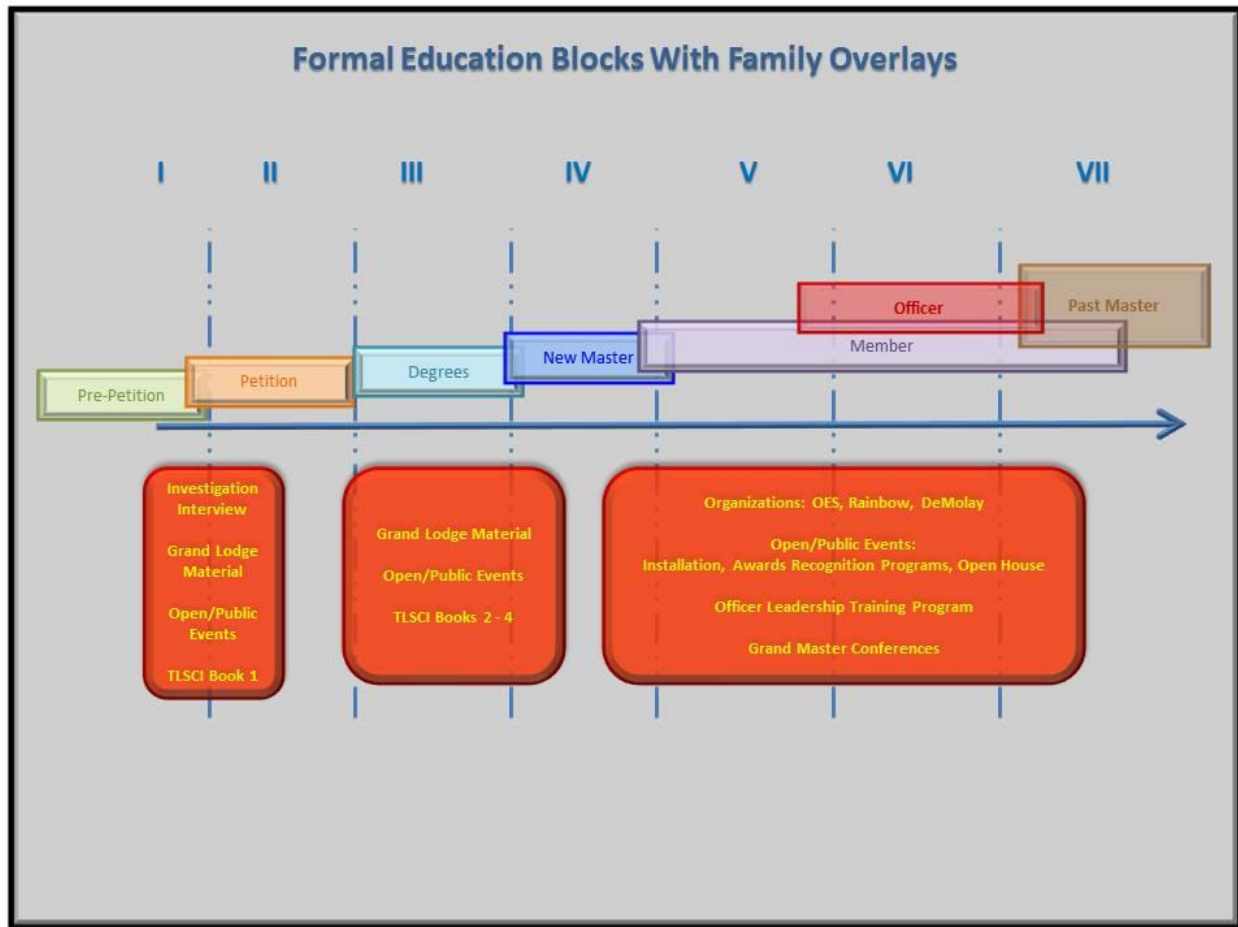


Figure 16 - Formal Education Blocks with Family Overlays

APPENDIX VII – Seeking Sources

1. Authors

Here is a brief list of some of the authors many consider reliable. It is not intended to be all-inclusive; it is just a list of authors I have read, and of authors recommended to me by learned brothers or who are cited by others in their own writings.

Steven C. Bullock	Albert G. Mackey	J.S.M. Ward
Carl H. Claudy	S. Brent Morris	Walter Leslie Wilmshurst
Todd E. Creason	John S. Nagy	David Harrison
Rev. Neville Barker Cryer	Albert Pike	Allen E. Roberts
Stephan Dafoe	Michael R. Poll	Art DeHoyos

2. Where to Find Material

Some suggested sources and locations of educational information

Masonic Service Association - <http://www.msana.com/> & also <http://shopping.msana.com/>

Knights Templar Magazine - <http://www.knightstemplar.org/KnightTemplar/archive/>

Grand Royal Arch Chapter of Texas - <http://www.yorkritetexas.org/chapter/Education.php>

Grand Council of Royal & Select Masters of Texas -
<http://www.yorkritetexas.org/council/Education.php>

Grand Lodge of Texas – <https://grandlodgeoftexas.org>

Scottish Rite of Freemasonry - Supreme Council, 330 Dg, Southern Jurisdiction, USA

- **Scottish Rite History** - <https://scottishrite.org/about/history/>

- **Scottish Rite Videos** - <https://www.youtube.com/user/ScottishRiteMasons>

- **Scottish Rite FaceBook** - <https://www.facebook.com/ScottishRiteFreemasonry>

The Phoenixmasonry Masonic Museum and Library (online) - <https://www.phoenixmasonry.org/>

The Grand Lodge of Massachusetts (online) – What Is Freemasonry -
<https://massfreemasonry.org/what-is-freemasonry/>

- **More follows** -

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Grand Lodge of Pennsylvania, Masonic Education Resources -

<https://pagrandlodge.org/masonic-education/>

3. Non-Masonic Sources

Amazon – Amazon.com – search on either “Freemasonry” or “Masonic” under books or “TV and Movies”

Half-Priced Books – start in the Metaphysics section and if you don’t see them there, ask the staff

EBay

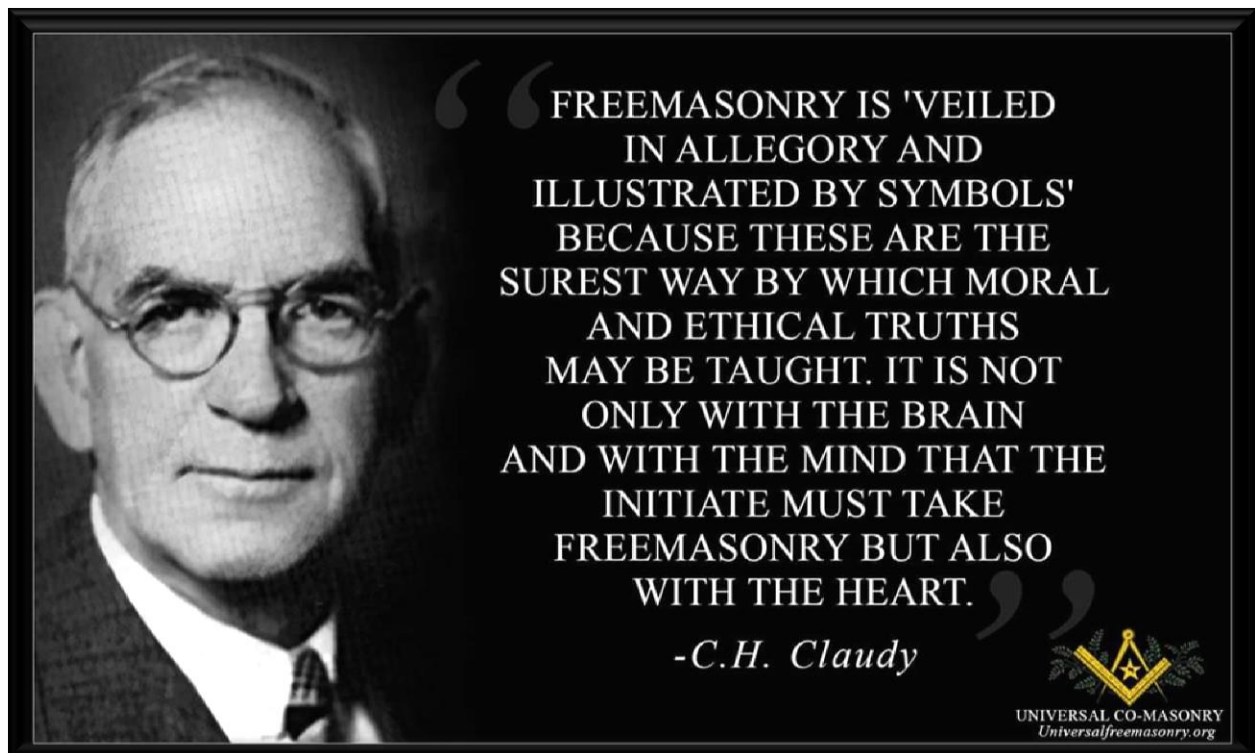


Figure 17 Carl H. Claudy

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