

Candidate Investigation Procedure

Completion of the Petition

- 1) The Secretary (or Brother) will provide the Candidate a copy of the standard petition along with a copy of the Investigation Authorization Form.
- 2) The petition must be signed by two Brethren of our Lodge as Recommenders, who will attest to the character and moral fiber of the Candidate, and to their having knowledge of the Candidate for a period of not less than one year. If two Brethren cannot so attest, then two Brethren may simply sign as Recommenders, and indicate that they have known the Candidate for 0 - zero years. When a petition is submitted with zero years being indicated, then it will be the responsibility and duty of the Investigation Committee to follow the additional investigation procedures indicated in the Follow-up section, Item 2.
- 3) Upon return of the petition to the Secretary, the Secretary will insure that both forms have been completed properly and completely, and that the appropriate funds have been surrendered.
- 4) The Secretary will notify the Worshipful Master of the petition. It will be the responsibility of the Worshipful Master to appoint committee members who have been properly schooled in the procedures of conducting an investigation.
- 5) The top level appointee will serve as the Committee Chair, and it will be his responsibility to coordinate the pre-interview work of the committee, schedule the interview, and conduct the post-interview review.

Prior to Candidate Interview (Should commence immediately upon Committee assignment)

- 1) The Secretary (or assigned Committee member or Brother) will perform the Background Investigation utilizing the Investigation Authorization Form. The output of the Background Investigation will be provided to the Chairman of the Investigating Committee. The Investigation Authorization Form will be provided to the Committee Chair in a sealed envelope. Alternatively, the Investigation Authorization Form may be returned by the Secretary, if the need arises.
- 2) The Secretary will provide committee members a copy of the petition along with the Committee Assignment Form.
- 3) The Committee Chair (or assigned Member or Brother) will conduct the following additional electronic checks:
 - a) Facebook
 - b) Twitter
 - c) LinkedIn
 - d) Google Search
 - e) Spokeo
 - f) OSCN.net
 - g) ODCR.com
 - h) doc.state.ok.us

- 4) The Interview of References and Recommenders - it will be the responsibility of the Committee Chair to assign and coordinate with his Committee members to insure these interviews are conducted fully and in a timely manner.
 - a) Questions to be asked
 - i) How long and in what capacity have you known the Candidate?
 - ii) Why do you feel comfortable recommending him?
 - iii) Is he the kind of man you would trust to care for your family in a crisis?
 - iv) What qualities does the Candidate possess which would make him a good Mason?
 - v) To their knowledge has the Candidate ever had trouble with:
 - (1) Obeying the Law
 - (2) Drugs and/or Alcohol
 - (3) Finances
 - vi) What failing in character or moral fiber, if any, do they have knowledge of?
- 5) Other Lodges - On the petition the Candidate is asked if he ever petitioned any other Lodge. If any are listed, that Lodge should be contacted to determine the reason that the candidate was not accepted.
- 6) The Committee will meet or converse, before the Candidate Interview, to review the findings to date.
- 7) The Committee Chair will coordinate Committee Member's availability prior to contacting the Candidate.

Original Contact of the Candidate by the Committee Chair

- 1) Location of the Interview - unless exceptional conditions exist, the interview should always be conducted in the Candidate's home. How a man lives and cares for his home can speak volumes.
 - a) The Chair should obtain any additional instructions from the Candidate on how to locate the Candidate's home to insure arrival at the Interview without delay.
- 2) The Candidate's wife, fiancée, or long term relationship partner should ALWAYS be in attendance at the interview. This is critical to determine the comfort level of the household with the Candidate's decision to join the Fraternity, and to provide the partner an opportunity to ask questions. It should be stressed to the Candidate the importance of meeting with him AND his partner, and if the issue is simply scheduling, that the committee will accommodate their schedule. If the partner declines the request, this would warrant a more detailed investigation upon the part of the investigating committee, as detailed in the Follow-up Section, Item 2.
- 3) Once a time and location of the interview is set, the Chair should inform Committee Members

Candidate Interview

- 1) It is preferable that the Committee Members arrive at the Interview on time and at the same time. This simple courtesy will make a favorable impression.
- 2) Committee members should arrive in clean attire, appropriate for attending one of our Stated Meetings. If possible, Members should coordinate to wear like Lodge shirts to further the favorable impression.

- 3) Begin the interview by thanking the Candidate and his partner for taking the time to meet.
- 4) Inform them that this interview is a two way communication. They are free to, and are encouraged to; ask any questions they may have. Pay particular attention to assure the partner that you value and solicit her participation and questions.
- 5) The Committee Chair should return the Investigation Authorization formed given him in the sealed envelope by the Secretary to the Candidate. If does not have the form, he should inform the Candidate that the Lodge Secretary will be returning the form.
- 6) Questions to Ask:
 - a) Ask about the Candidate's job:
 - i) How they chose that career and company?
 - ii) How long have they worked there?
 - iii) What do they like about the work?
 - iv) If they could make a change in their career, what would it be?
 - v) What are their long term career goals?
 - vi) How much time is required by their job? Overtime?
 - vii) Self Employed?
 - (1) Can he provide three business references and contact information?
 - b) Ask the Partner's job:
 - i) How they chose that career and company?
 - ii) How long have they worked there?
 - iii) What do they like about the work?
 - c) Educational background:
 - i) Where did they go to school?
 - ii) Did they attend college?
 - iii) Graduate?
 - iv) Field of Study?
 - v) If field of study differs from current occupation, how did this occur?
 - d) Children - ask the CANDIDATE
 - i) Children's names
 - ii) Ages
 - iii) Schools
 - iv) After school activities - this may give you a feel for the available time of the Candidate
 - v) Ask if he has children from another relationship
 - (1) If so, ask the same questions as above
 - (2) If the children do not live with the Candidate
 - (a) Ask for the contact information of the mother or person that the children reside with
 - (b) If the Candidate is reluctant to provide the contact information, inform the candidate that any information provided by the other party will be treated with the appropriate amount of understanding given the source.
 - (c) If the Candidate is still reluctant, ask if there is some reason why they should not contact that person.

- (3) If a candidate is not in compliance with child support, he has no business being a Mason.
- e) Other Organizations
 - i) What other organizations does the Candidate belong to and for how long?
 - ii) Has the Candidate now or has he ever been an officer in that organization?
 - iii) How much time does he spend on that organization?
 - f) Hobbies
 - i) What are they and how long has the Candidate been doing it?
 - ii) What about the hobby appealed to him?
 - iii) How much time does the hobby require of him?
 - g) Armed Forces Record
 - i) Active, Inactive, Reserves, or Retired?
 - ii) Duty Station and Assignment?
 - iii) Current or final rank?
 - iv) Honorably discharged?
 - h) Church
 - i) Explain that this not a requirement, but that no atheist can be a Mason.
 - ii) Currently attending where?
 - iii) Active?
 - iv) Any church roles or responsibilities?
 - i) Criminal History
 - i) If any, of what nature?
 - ii) All issues resolved? If so, when?
 - j) What does the Candidate know about Masonry?
 - i) Does he have a family history within Masonry?
 - ii) Does he know other Masons, other than his references or recommenders? If so, who?
 - iii) What type of research has he done about Masonry?
 - iv) During his research, did any of his findings cause him any concern? If so, what?
 - k) Why does he want to become a Mason?
 - i) What about Masonry appeals to him?
 - l) Why does he think he will be a good Mason?
 - i) What value can he bring to the Fraternity?
 - ii) How would the Fraternity benefit from his participation?
 - m) Why has he chosen this time to join?
 - n) Ask the Candidate AND his partner what concerns, if any, they may have about his joining the Fraternity?

Things to Explain:

- 1) Masonry is a Fraternity
 - a) Explain that this is a social organization, not a civic, nor political organization
 - b) Explain to the partner that even though the Candidate will be the member, that the partner and their family are of the highest importance to the Fraternity, and that

- Masonry is not intended to interfere with a man's commitment to God, his family, his occupation, or his country.
- c) Explain that no alcohol is permitted in the building, nor is the use of tobacco products of any kind.
- 2) Masonry is NOT a Religion
 - a) Although we seek to encourage a man to continue to seek knowledge and grow in character and moral fiber, we do not offer a path to salvation, and therefore are not a religion.
 - b) As we are not a religion, nor pretend to be one, we cannot therefore be a cult, despite what anti-Masonic writings may infer.
 - c) No man may become a Mason who is an atheist. Our requirement for membership is that the Candidate has a fundamental belief in, and love for, the one true God. What religion, if any, that he practices is between him and his Maker.
 - 3) Masonry is not a Charity
 - a) Masonry is an organization that believes in doing charitable deeds, but we are not a charity.
 - b) Explain that donations of time or money are NEVER mandatory, and that all monies used for charitable acts are obtained from Lodge funds, fundraisers, or voluntary contribution.
 - 4) Masonry is not a secret organization
 - a) Explain that we are an organization that has secrets, just like any large organization
 - i) Examples would be - the secret formula for Coke, or the Hostess Twinkie Recipe.
 - ii) Other examples would be any company's proprietary data, research, or product development.
 - b) Explain that the reason that we keep things secret is a matter of tradition and a test to a man's character.
 - c) Explain to the partner that although the Candidate may not be able to fully tell her the activities which go on during our ritual, assure her that is merely the ritual itself that is secret.
 - 5) Financial Responsibility
 - a) Explain that there will be an obligation to pay dues for life. Ask if the financial demands of paying dues will be a concern for him and let him speak.
 - b) Explain that once he has become a Master Mason, if he is so inclined, that a Perpetual Membership may be purchased.
 - c) Masonry will not be a source for their financial support, but that things like Promises Matter do exist to help a Brother that has a disastrous event.
 - 6) Not a Business Contact Point
 - a) Explain that joining the Fraternity is not for business purposes.
 - b) Explain that he may not solicit business from the Brethren.
 - c) Explain that if he is approached by a Brother for his services, that this does not constitute solicitation upon his part, and that he is free to provide his services upon request.
 - 7) Explain about the dress code and the applicable times.
 - 8) Explain what is to follow this Interview

- a) Explain when the committee will report to the Fraternity
 - b) Explain about the voting and notification process.
 - c) Explain about the initiation
 - i) Explain that this is a solemn and serious event, not liken to college hazing or initiation rituals.
 - ii) Explain that the content of the initiation ritual is not to be discussed with anyone outside of the Fraternity.
 - d) Explain about the training which is to follow
 - i) Explain that he will be assigned an instructor, unless he knows of a Brother who has volunteered to act as one.
 - ii) Explain about the time requirement upon his part. Ask if this will be a concern.
 - iii) Explain that he will be required to commit to memory his lessons, and ask if this will be a concern for him.
 - e) Explain about the Degrees process and the associated training.
 - i) Explain about the Master Mason proficiency and the ability to go on to other orders or to serve as an officer.
 - ii) Explain that once the training is complete, he will no longer be required to commit such time, but that his participation in all our activities is earnestly solicited.
- 9) Other Orders
- a) Scottish Rite, York Rite, Shriners (and various affiliations)...
 - b) Eastern Star, Amaranth, DeMolay, Rainbow, Job's Daughters...
- 10) Widows and Orphans
- a) Finish by explaining to the partner that even after the passing of the Brother, that if the member and his partner were married, that the partner and their family will always be a part of the Masonic family, as long as the partner so desires, or until they remarry a non-Mason.

Follow-Up

- 1) The committee members should meet either immediately thereafter, or as soon as possible to confer on their findings, while the information is still fresh in their minds.
- 2) If the answers given by the candidate conflicted or did not agree with information previously gathered, or if you have suspicion, then investigate the following further:
 - a) Current and past Employers - most large companies will only respond that the man is currently employed or not, but other companies may be willing to give more detail.
 - b) Church - contact the pastor, Sunday School teacher, etc...
 - c) Neighbors
 - d) When applicable, ask them the same questions that were asked of the References.
- 3) If business references or information about prior partners with children were provided, the committee chair should make assignment of the committee members to perform the needed interviews.
- 4) The Chair should collect the copies of the petition and return them, along with the Background Investigation material, to the Lodge Secretary for destruction.
- 5) If additional time is needed to conduct/conclude the investigation, the Committee Chair should contact the Worshipful Master to seek additional time.

- 6) Once the Committee has concluded all facets of the investigation, they report at the appropriate business meeting.