



# DISTRICT DEPUTY GRAND MASTER

## LODGE VISITATION CHECKLIST

**PLEASE PRINT OR TYPE**

The following checklist is for the DDGM to use as a guide to ensure that the Particular Lodge is in compliance with the rules and regulations of the Grand Lodge of Florida. This report shall be completed and sent to the Grand Master no later than five working days after the DDGM's official visit to the Lodge. The Worshipful Master and Lodge Officers are to assist the DDGM in filling out this checklist so that they may better understand the functionality and responsibilities of the Lodge.

Lodge Name & Number:  Zone:  District:

DDGM's Name:  Report Date

Name of Lodge Officers:

W.: M.:	<input style="width: 350px; height: 20px;" type="text"/>
S.: W.:	<input style="width: 350px; height: 20px;" type="text"/>
J.: W.:	<input style="width: 350px; height: 20px;" type="text"/>
TREAS.:	<input style="width: 350px; height: 20px;" type="text"/>
SEC.:	<input style="width: 350px; height: 20px;" type="text"/>

Regular Members:	<input style="width: 30px;" type="text"/>	Emeritus Members:	<input style="width: 30px;" type="text"/>
Dual Members:	<input style="width: 30px;" type="text"/>	Plural Members:	<input style="width: 30px;" type="text"/>
Initiated:	<input style="width: 30px;" type="text"/>	Affiliations: Demits:	<input style="width: 30px;" type="text"/>
NPD'S Reinstated :	<input style="width: 30px;" type="text"/>	Total Members:	<input style="width: 30px;" type="text"/>
Perpetual Members:	<input style="width: 30px;" type="text"/>		

Yes	No	<b>I. CHECKING THE FINANCIAL PROCEDURES</b>
		1. Is there a voucher/warrant system in place for monies received and transferred from Secretary to Treasurer? Chapter 24 and Reg. 13.03
		2. Does the Treasurer's Report detail receipts and disbursements from where and recorded? Ch. 24 UCB 6.05 & 6.06
		3. Does the Lodge have a separate Charity Fund account? UCB 11.01
		4. Does the Treasurer's files contain records of bank statements and reconciliation reports?
		5. Are the Sales Tax payments to Florida Department of Revenue completed and submitted on time?
		6. Is the Lodge registered with Department of Agriculture to comply with fundraising laws? (GL220/ F.S. 496)
		7. LYPMGC Quarterly Reports submitted to Grand Lodge in a timely basis and filed in Lodge Records? R22.07
		11. Date when 990EZ filed with the IRS and <input style="width: 80px;" type="text"/> date copy sent to Grand Lodge . <input style="width: 80px;" type="text"/>
		12. Date when Property Appraisal Tax Exemption Form filed <input style="width: 80px;" type="text"/> and date when Grand Lodge notified. <input style="width: 80px;" type="text"/>
		13. Do you Own, Rent, or Lease? <input style="width: 300px;" type="text"/>

Yes	No	<b>II. INSURANCE AND OTHER AGREEMENTS</b>
		1. Is there a Certificate of Liability Insurance Binder for the Lodge? (required by Grand Lodge)
		2. Is there a Rental Agreement on file for every renter? If no renter <b>N/A</b>
		3. Is there a Release, Hold Harmless and Waiver of Liability Agreement for every renter? If no renters <b>N/A</b>
		4. Is there a Certificate of Liability Insurance Binder per group that meets on Lodge Property? If no groups <b>N/A</b>
		5. Does the lodge carry Hired Auto Liability Coverage and Non-owned Auto Liability Coverage?
		6. Does the lodge carry additional Commercial Umbrella coverage?
		7. Does the lodge carry additional Flood Insurance?

### IV. DISTRICT DEPUTY GRAND MASTER'S VISIT TO THE LODGE

When did the District Deputy Grand Master visit the Lodge?		
Principal Officers In attendance	Subordinate Officers in attendance	Total Members in attendance

### V. GRAND MASTER'S VISIT TO THE DISTRICT

When did the Grand Master visit the District?		
Principal Officers In attendance	Subordinate Officers in attendance	Total Members in attendance

### VI. GRAND LODGE COMMUNICATION ATTENDANCE

Was the Lodge represented at the last Annual Communication?		
Principal Officers In attendance	Subordinate Officers in attendance	Total Members in attendance

### VII. LODGE ATTENDANCE

What is the average Lodge meeting attendance of all officers and members per annual quarter?			
First quarter / Q1 (01/01 - 03/31)	Second quarter / Q2 (04/01 - 06/30)	Third quarter / Q3 (07/01 - 09/30)	Fourth quarter / Q4 (10/01 - 12/31)

### VIII. LODGE PARTICIPATION

1. How many Lodge Members attended the Masonic Home Pilgrimage Day last year? Date: <input style="width: 50px;" type="text"/>	
2. How many of the Principal Officers attended a Board of Trustees meeting at the Masonic Home in the past year?	
3. How many of the Principal Officers have completed Masonic Leadership Training ?	
4. Other than the Principal Officers, how many of the Lodge Members have completed Masonic Leadership Training?	
5. What is the average Lodge attendance for Masters & Wardens or Master Mason Associations meeting?	
6. What is the average Lodge attendance for Ritual Schools of Instructions meeting?	
7. What is the average Lodge attendance for Open Books each month?	
8. How many months a year does the Lodge go dark or recess?	
9. How many Degrees has the Lodge conferred this year?	
10. How many times has the Lodge used courtesy work from another Lodge this year?	

### IX. LODGE FUNDRAISERS

Yes	No	IX. LODGE FUNDRAISERS
		1. Does the Lodge conduct fundraisers to the public? F.S. 496 SOLICITATION OF FUNDS / 28.07.1
		2. Do all brochures, flyers, or tickets used in connection with the fundraisers comply with F.S. 496 ?
		3. Does the Lodge conduct games of chance or raffles to the public? F.S. 849.0935 / F.S. 496
		4. Do all brochures, flyers, or tickets used in connection with games of chance or raffles comply with F.S. 849.0935 / F.S. 496 ?
		5. Is there alcohol being served at the public fundraiser? If Yes, go to questions 6 & 7. (if not <b>N/A</b> )
		6. Do the servers meet the certification standards to serve alcohol required by F.S. 561.705?
		7. Does the Lodge carry additional liquor liability insurance for all public fundraisers where alcohol is served?
		8. Other than Masonic charities, has the Lodge held fundraisers for a 501c3 non profit to the public? If Yes,
		9. Did the 501c3 non profit provide the liability insurance for the fundraisers?

Yes	No	<b>X. LODGE COMMITTEES</b>
		1. Finance Committee Reg. 24.05 UCB 10.02 Senior Warden Chairman
		2. Vigilance Committee Reg. 24.05 UCB 10.03 Junior Warden Chairman
		3. Petitions Committee Reg. 24.05 UCB 10.04 & Reg. 33.08 Chairman appointed by Worshipful Master
		4. Masonic Education Reg. 24.05 UCB 10.05 Reg. 37.12 & 37.18
		5. Board of Relief Reg. 24.05 UCB 10.06 Worshipful Master & Wardens
		6. Investigations Committee Reg. 24.05 UCB 10.07 Appointed by Worshipful Master per instance as needed
		7. Charity Committee Reg. 24.05 UCB 10.08 Appointed by the Worshipful Master
		8. Lodge Property Committee Reg. 24.05 UCB 10.09 Appointed by the Worshipful Master

Yes	No	<b>XI. OTHER LODGE DUTIES, REQUIREMENTS &amp; PRACTICES</b>
		1. Does the Lodge maintain a Roll of Members signed by all the members UCB 3.06?
		2. Are geographical waivers of jurisdiction obtained when necessary? Art X Sec, 24 & Ch. 38
		3. Have the Candidates read and signed the Lodge By-Laws? Article X Section 14 Constitution
		4. Match Background Investigations receipt with Petitions for Initiation, Affiliation and Reinstatements?
		5. Does the Lodge conduct regular Ritual Practices for Degrees?
		6. Is the Lodge System of Masonic Education fully implemented with a mentoring system in place?
		7. Does the Lodge conduct Lodge Officers Education?
		8. Is Masonic Education held at least once a month at a Stated Communication or Education night at the Lodge?
		9. Does the Lodge conduct Catechism Instructions?
		10. Does the Lodge have a Catechism Instructor other than the Mentor?
		11. Are Masonic Service Awards presented in a timely manner?
		12. Are the Brothers on the Emeritus list being contacted and investigated annually?
		13. Are the minutes approved by the Craft and signed by the Worshipful Master?
		14. Are all Lodge records, files, reports, and minutes in a secure and protected location?
		15. Are Allied and Appendant Bodies notified of NPDs and Death?
		16. Are the Members of the Lodge notified monthly of all meetings and events via the Trestleboard?

ADDITIONAL COMMENTS: