

### The investigator's important role

A thorough and unbiased character investigation is critical to the well-being and harmony of your lodge and the future of California Masonry. As an emissary of the fraternity, your important role is to determine – to the best of your ability – whether you would trust the applicant to be your brother.

Through conversations with the applicant and his recommenders and references, you will ascertain the quality of the applicant's character and his motivations to become a Mason, including his expectations of what he will gain from membership, whether he shares our Masonic values, and whether he will readily share our fraternal responsibility to each other and contribute to our charitable programs.

### What to listen for in the character investigation conversations

Through the character investigation process, you are striving to ascertain the applicant's purpose in seeking membership and if he has the character and qualities required to be a Mason.

In your conversation with him, listen to how the applicant describes his expectations and perceptions of membership in order to determine his intent: Is he seeking fellowship, self-improvement, expanded knowledge, community involvement and service? Remember that if the applicant is motivated by individual gain, such as business networking opportunities, or if he is seeking a safety net through the services we offer our members, he is not the right fit for Masonry.

As for character, you are trying to determine whether the applicant possesses those characteristics that define a Mason – the moral qualities and ethical standards that our fraternity values:

- **Brotherly love.** We value respect, freedom, kindness, tolerance, and our differences – religious, ethnic, cultural, social, generational, and educational – and strive for harmony in our individual lives, in our lodges, and in our greater community.
- **Relief.** We take responsibility for the well-being of our brothers, our families, and the community as a whole.
- **Truth.** We stay true to our personal code of conduct and ethics – honor, integrity, personal responsibility, and the continuous pursuit of knowledge.

**Preparing for the applicant character investigation conversation**

When the lodge master appoints you to the character investigation committee for an applicant, he will give you a character investigation form that is preprinted on the first page with information entered into iMember from the application. The second and third pages include the questions to guide your conversations with the applicant, his recommenders, and one of his references – if this task is assigned to you. The last page is your report to the master.

In advance of your conversation with the applicant:

- Schedule a meeting time that will be uninterrupted (approximately 1 – 1.5 hours).
- Arrange to meet at the applicant's home or in another private and comfortable location.
- Invite the applicant's spouse or partner to join you.
- Plan to wear attire that will create a favorable impression of the lodge and fraternity.
- Review this guide so you are prepared to conduct the conversation, ask the necessary questions, and provide the specified information to the applicant.
- Review the character investigation form and prepare to make notes on it for your report. The questions you are to ask the applicant, his recommenders, and one of his references (if assigned) are included on the form for your reference.
- Read the application if you were not present when the application was read at lodge.

**Your conversation with the applicant**

Here are some guidelines for your conversation with the applicant:

- Conduct yourself in a professional manner.
- Ask pointed questions that reveal character and intent.
- Be an active listener; observe reactions to your questions.
- Ask follow up questions to get more specific information that will reveal the applicant's true self.
- Encourage both the applicant and his spouse or partner to ask questions. Answer honestly, but don't dominate the conversation.
- At the conclusion of the meeting, remember to thank the applicant and explain that he will be contacted after the results of his interviews are reported to the lodge and the vote is taken.
- Wait until after the meeting to make notes on the character investigation form.

Make the applicant comfortable so that he will be able to speak candidly. Introduce yourself and provide some personal information, such as how long you have been a Mason, how long you have been a member of your lodge, and a little about your involvement in lodge activities. Share the purpose of the conversations: for the investigators to become better acquainted with him and to provide him the opportunity to learn more about Masonry. Explain that the interviewers are anonymous to each other and ask if he has been interviewed yet so you do not repeat some of the information already explained.

If you are not the first investigator he is meeting with, ask if he has any questions about what was explained to him in the previous interview(s) about membership qualifications, candidate expectations, and your lodge.

The next phase of your conversation is to first ask questions that indicate his intent, then move to questions that reveal his character. The following questions will facilitate an informative conversation. Feel free to ask additional questions.

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**Applicant questions that indicate intent**

Ask key questions that will indicate the applicant's intent in seeking to join the fraternity. We have included notes to help you determine what information each question is intended to reveal.

- Why do you want to become a Mason?  
*Reveals his motivations, such as social relationships, personal growth, or community service.*
- What do you want to learn from Masonry?  
*Reveals whether he has a desire to learn and is dedicated to personal growth.*
- What are your expectations of membership?  
*Indicates more about his motivations, what he is seeking, and his interests.*
- Why have you chosen to join our lodge?  
*Reveals if he has a connection to the lodge and its members, as well as his anticipated involvement.*

**Applicant questions that reveal character**

After asking the questions regarding the applicant's intent, you will choose character questions that you feel are the most appropriate to help you gain a better understanding of the applicant. These are behavioral interview questions, which cannot be answered with a simple 'yes' or 'no'. We have included notes to help you understand what each question is intended to reveal.

- How do you spend your leisure time?  
*Indicates his lifestyle, focus, and interests.*
- In what ways are you involved in the community?  
*Reveals whether or not he makes time for service to others, is involved with family or children's activities, cares about others, and is civic-minded.*
- What role does charity play in your life?  
*Reveals whether or not he is charitable, will provide relief in the lodge, and will contribute to our charitable programs.*
- Tell me about a time when you helped someone who was difficult to help.  
*Reveals whether or not his commitment to and philosophy regarding relief.*
- Tell me about a leadership situation that was challenging for you.  
*Reveals whether or not he is aligned with our values of personal responsibility, truth, and integrity.*
- Do you see yourself participating in lodge more as an active leader or quietly working behind the scenes?  
*Reveals whether or not he is more of an independent performer or a team player.*
- How important to you are friendships with people significantly older or younger than you?  
*Reveals whether or not he values multi-generational fellowship and relationships.*

**Important information for the applicant**

If you are the first investigator to meet with the applicant, share information with him about membership qualifications, your lodge, and candidate expectations. Explain that the character qualities we look for in applicants are the moral and ethical standards that Masons value worldwide: brotherly love, relief, and truth.

- **Review the membership requirements**

- Must be a man, age 18 or older
- Must meet the qualifications and standards of character and intention
- Must believe in a Supreme Being

- **Tell him about the lodge**

- Lodge history and culture
- Lodge dues
- Types of lodge meetings and what happens at them
- Attendee expectations at lodge monthly stated meeting and as many other meetings and activities as possible
- Philanthropic and community activities
- Family involvement

- **Explain the expectations for candidates for the degrees**

Using the following information, describe the degree process, memorization requirements and proficiencies, time requirements, and what can be expected from the experience:

**The degree process**

The three stages of Masonic membership – Entered Apprentice, Fellow Craft, and Master Mason – are referred to as “degrees” and correspond with the candidate’s self-development and increased knowledge of Freemasonry.

- Initiation: In the first degree, candidates are initiated into the fraternity as an Entered Apprentice. The initiation ceremony, which has been used for many centuries, takes place at the lodge.
- Candidate education: As he completes each degree, the candidate learns more about Masonry. Following each degree, he is required to complete a candidate education course, and must recite from memory a portion of the ceremony.
- Masonic coach: Each candidate will have a brother appointed as his Masonic coach, who will act as the candidate’s educator and companion. The coach will teach the candidate the memory work and will prepare him to complete the education courses. Lifetime friendships are often formed between a candidate and coach.

The time required to learn the memory work and pass the proficiency requirements will vary from candidate to candidate. Normally, a candidate will devote at least two hours per week working with a coach and at least as much time working on his own. The coaching and preparation normally takes between six and eight weeks for each degree. Upon completion of the third degree, the candidate becomes a Master Mason and is entitled to full participation in the business of the lodge.

The lessons learned in the degrees are serious, inspirational, time-tested, and expand upon the Masonic values of brotherly love, relief, and truth, and how they apply to Freemasonry today. Through these teachings, candidates develop a deeper understanding of Masonry and the role Masonry will play in their pursuit of lifelong learning.

Ask the applicant if he believes he can commit the time necessary to learn the memory work and complete the education course. Also ask if he has any questions or concerns about the initiation process.

**Concluding your conversation**

Ask the applicant and his spouse or partner if they have any questions based on that they have heard or read about Masonry. If they don't, be sure to explain a little more about the fraternity if it did not already come up in your conversation.

- Culture of values, learning, philanthropy, and relief through fraternal support
- Opportunities for learning, leadership, and fellowship

**Confirming intent and character with recommenders**

Remember, the recommenders vouched on his application that the applicant possesses the intent and character necessary to become a Mason.

Contact the recommenders and ask the questions below. Try to maintain your anonymity as best you can, whether you contact the recommenders by phone or email. During your conversation, listen for positive statements offered quickly, as well as any hesitant or evasive answers. Make notes on the character investigation form after your discussions.

**Questions for recommenders**

- How do you know him?
- Why do you recommend him?
- Why do you think his values align with our fraternal values?
- What will he contribute to our lodge?

**Confirming intent and character with a reference**

iMember will assign one reference each to two of the three investigators. If you are one of the investigators assigned to interview a reference, his or her information will be preprinted on the character investigation form provided by your lodge's master.

When you call the reference, identify yourself and the purpose of your call. Explain that the applicant has applied for membership in your Masonic lodge and has listed him or her as a reference. Explain that you would like to ask a few questions to better understand the applicant. Ask whether it is a good time to engage in a discussion or whether you should call back at a more convenient time. Remember to make notes on the character investigation form after your call.

**Questions for references**

- How long have you known (him)?
- How do you know him?
- What are some of his best qualities?
- Is there any reason you would not recommend him to membership in a community organization such as the Masons?

**Submitting your character investigation report**

The final step is to complete the character investigation report page of the character investigation form and submit the form to the lodge master by the date specified.

Remember, your duty is to be certain – without any doubts – that the applicant is qualified to be a Mason. After conducting a thorough character investigation, if you have any reservations about the applicant, you should, without hesitation, submit an unfavorable report.



## Applicant Character Investigation

\_\_\_\_\_ Logos \_\_\_\_\_ Lodge No. 861 \_\_\_\_\_, 20\_\_\_\_

Dear Brother:

I hereby appoint you to investigate the character and intent of \_\_\_\_\_,  
whose application for the degrees of Masonry was received by our lodge at its last stated meeting.

Birthdate \_\_\_\_\_

Home address \_\_\_\_\_

Preferred contact phone number \_\_\_\_\_

Email \_\_\_\_\_

Spouse/partner name \_\_\_\_\_

Occupation \_\_\_\_\_

The applicant was **recommended** by:

Brother \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Brother \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

His personal **reference** is: *If no name is listed here, you are not responsible for interviewing a reference.*

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Complete and return this character investigation report to \_\_\_\_\_  
(master)

by \_\_\_\_\_ (Date)

Address \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

**QUESTIONS TO ASK THE APPLICANT****1. Questions that indicate intent**

- **Why do you want to become a Mason?**  
*Reveals his motivations, such as social, personal growth, or community service.*
- **What do you want to learn from Masonry?**  
*Reveals whether he has a desire to learn and is dedicated to personal growth.*
- **What are your expectations of membership?**  
*Indicates more about his motivations, what he is seeking and his interests.*
- **Why have you chosen to join our lodge?**  
*Reveals whether or not he has a connection to the lodge and its members, as well as his anticipated involvement.*

**2. Questions that reveal character**

- **How do you to spend your leisure time?**  
*Indicates his lifestyle, focus, and interests.*
- **How are you involved in the community?**  
*Reveals whether or not he makes time for service to others, is involved with family or children's activities, cares about others, and is civic-minded.*
- **What role does charity play in your life?**  
*Reveals whether or not he is charitable, will provide relief in the lodge, and will contribute to our charitable programs.*
- **Tell me about a time when you helped someone whom it was difficult to help.**  
*Reveals his commitment to and philosophy regarding relief.*
- **Tell me about a leadership situation that created a difficult challenge for you.**  
*Reveals whether or not he is aligned with our values of personal responsibility, truth, and integrity.*
- **Do you see yourself participating in our lodge as an outgoing activities booster or quietly working behind the scenes?**  
*Reveals whether he is more of an independent performer or a team player.*
- **How important to you are friendships with people significantly older or younger than you?**  
*Reveals whether or not he values multi-generational fellowship and relationships.*



**QUESTIONS TO ASK RECOMMENDERS**

Name of first recommender: \_\_\_\_\_

- How long have you known (applicant's name)?
- How do you know him?
- Why do you recommend him?
- Why do you think his values align with our fraternal values?
- What will he contribute to our lodge?

Name of second recommender: \_\_\_\_\_

- How long have you known (applicant's name)?
- How do you know him?
- Why do you recommend him?
- Why do you think his values align with our fraternal values?
- What will he contribute to our lodge?

**QUESTIONS TO ASK THE REFERENCE**

*Note: Only two investigators will be randomly assigned (through iMember) to contact a reference. If no name is listed on first page, you are not responsible for interviewing a reference.*

Name of Reference: \_\_\_\_\_

- How long have you known (applicant's name)?
  - How do you know him? (co-worker, neighbor, relative, etc.)
  - What are some of his best qualities?
  - Is there any reason you would not recommend him to membership in a community organization like the Masons?
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**INVESTIGATOR REPORT**

- ☐ I interviewed this applicant in person at his
- ☐ home      ☐ work      ☐ other \_\_\_\_\_ (check one)
- ☐ His spouse or partner participated in the discussion
- ☐ He has sufficient mental capacity to understand and appreciate the lessons of Masonry
- ☐ He is striving to improve himself
- ☐ He has the means and will to pay lodge dues and shares our responsibility for our brothers and our charitable causes
- ☐ He shares Masonic values
- ☐ His character demonstrates the qualities desired in a Mason
- ☐ His motivation to become a Mason is honorable
- ☐ Recommenders verify character and intent
- ☐ Reference verifies character and intent, if assigned

Comments

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After a thorough character investigation of the applicant,

- ☐ I believe the applicant meets the character and intent qualifications and I make a favorable report.
- ☐ I do not believe the applicant meets the character and intent qualifications and I make an unfavorable report.



Investigator

Date