

MASONIC INVESTIGATION

This Short Talk was written expressly for The Masonic Service Association's educational publications by Walter M. Callaway, Jr., Past Master of Oakland City Lodge No. 373, and of Lodge of Research No. 104, both in Atlanta, Georgia. We are deeply grateful to Brother Callaway for his interest and assistance.

This essay addresses itself to all Freemasons but more particularly to the Worshipful Masters of all regular Lodges and to those members of the Lodge who are, from time to time, honored by assignment to Investigative Committees.

Fortunately, there is little in this treatise which has to lean for authority on the ancient mysteries or on speculation of origin or background, *per se*, to justify the proper use of this tool of Freemasonry. No particular Masonic scholarship is required to consider the subject of Masonic Investigation. In this essay a Petitioner is so called from the time he submits his Petition to the Lodge for admission. It is after he is accepted that he becomes a Candidate.

Masonic Investigation covers a broad field, but in this presentation we shall limit its scope to that particular phase of investigation by which we try to ascertain all the pertinent information obtainable about a Petitioner for the Degrees of Freemasonry: his moral, mental, and physical qualifications to become a Freemason, a member of our ancient Brotherhood.

It is incumbent upon us, upon receipt of his Petition for the Degrees, to examine his personal background, his habits, his general philosophy of life, his reputation in the community and among his fellow-workers and associates. We are to diligently inquire among those who know him best and who can be relied upon to furnish as unbiased information as possible. From this information we are to collate and evaluate the Petitioner's qualifications to become one of us. It is not the easiest of Masonic tasks.

The Lodge Brother who is appointed by the Worshipful Master to serve as a member of the Investigating Committee should consider such appointment a high honor, a visible expression of implicit trust and confidence in his ability, his zeal, and his concern for the welfare of the Lodge and Freemasonry. The Worshipful Master, by this appointment, has clearly manifested his respect for the good judgment of the Brother so appointed.

No phase of Masonic work is more important than the thorough, impartial and unbiased investigation of those who seek admission into our ranks. The members of the Investigating Committee are the first line of defense against external enemies of the Craft as well as those who, through indifferent character, might be pious to bring discredit upon the Craft. Our fraternal security depends in great part on the ability and fidelity of our Investigating Committee and their findings. In the Ancient Charge at Raising, our duty in this respect is clearly and unmistakably pointed out to us: "To preserve the reputation of the Fraternity unsullied must be

your constant care." Besides being an admonition to us in the daily conduct of our lives, it also includes the acceptance of Petitioners.

Each member of this vitally important Committee should ever bear in mind that he may be investigating a Petitioner who might one day become Worshipful Master of his Lodge, or one who may sometime wear "the Purple of the Fraternity" and rule and govern the Grand Jurisdiction. He may be investigating a man who will never become renowned in the Fraternity or ever attend Lodge very often but who would accept the tenets and precepts of Freemasonry and live his future life in full accordance with the spirit of the Fraternity. A man who does not first have Freemasonry in his heart is not likely to ever acquire it in the Lodge room.

In 1824 a man was admitted, without due inquiry, into a Masonic Lodge in one of the Eastern states. As a result, some two years later, this proved the greatest disaster to ever befall Freemasonry in America. Not long afterwards saw the beginning of a long period of Anti-Masonic frenzy in the United States which came close to eradicating the Fraternity. Bigots, political knaves, religious charlatans, and sincere but misguided people united in trying to suppress the Order in America. For some fifteen years it was touch and go for the Fraternity all over the nation. (See *S.T.B. of March*, 1933, entitled "William Morgan.")

The Investigator has much to consider during his inquiry. How far does he go, how deeply does he delve, what questions are proper to ask, where is a satisfactory stopping place in his task? There is no easy answer to these questions, but he should go far enough and deep enough to satisfy himself beyond doubt that the Petitioner is indeed worthy of consideration for membership. One point should always be *stressed*: that the Investigator, perhaps pushed for time on his assignment, should never, under any circumstances, restrict his inquiry to contacting the Petitioner's Recommender and asking him for evaluation. When the Recommender brought in the Petition, -it was implied that he himself was satisfied. The Recommender may have thought he knew enough personally about the Petitioner to so recommend him, but at the same time he was relying on the Committee to obtain the full picture of the Petitioner. Nor should the Investigator, at the last minute before time to report, contact the other Committee members, ask the results of their discoveries and, if favorable, to "go along" with their reports. Such an investigation, on its face, is worthless. Each investigator should make an independent inquiry and file his own report, regardless of what the others may do. If the investigator needs more time, the Worshipful Master will grant him whatever reasonable time is needed. Freemasonry is in no hurry and works by no timetable.

How does one go about conducting a full and proper investigation? Obviously, no investigation can be "foolproof" and leave no margin for error or miscalculation. All the highly skilled and professional investigators in the world cannot guarantee the ultimate results of a character investigation. Men change. A man may be one thing today, another tomorrow. There is always the calculated risk. All of us have read of bankers who, after years of utterly honest dealings, have skipped the country with a suitcase full of money belonging to his depositors. Who has not heard or read of the minister, with a wife and family, who runs off with the pretty young widow in the choir: the respected public official who, after a quarter-century of honorable service, suddenly succumbs to a Ruffian named Bribery? No amount of investigation can fully prevent such occurrences.

Fortunately, such contingencies are rare. Many Freemasons express astonishment when they learn that General Benedict Arnold, once a brave, gallant, and faithful American soldier, but whose name has become synonymous with the word, Treason, was a practicing and faithful Freemason who used to visit Lodges during the war with General and Brother Washington. The most skillful and thorough investigation in the early days of Brother Arnold would not likely have presaged such a future possibility.

The Worshipful Master, in making appointments, should not concern himself with the convenience of the Investigator, to appoint him merely because he lives near or works in some proximity to the Petitioner. Not all Brethren are skilled or adept at investigative work. It is always advisable for the Worshipful Master, wherever possible, to select those who have investigative experience, or a talent for such. If they are available, the Worshipful Master might appoint those who are lawyers, law enforcement officers, private investigators, and the like. Because a Brother is a fine ritualist or a great coach does not mean that he is a competent investigator. At the beginning of his "year" the Worshipful Master would be well advised to examine his membership roll and select certain Brethren whom he knows to be qualified or to have such talents as are required. He should rotate such committee assignments among those chosen so that no one group is overly burdened with work.

He should then call a meeting of those selected for the year and explain to them their duties and what the Lodge requires of them. The meeting should produce a broad outline of what normally constitutes a thorough investigation and the Master should emphasize that no phase of investigation is to be left to chance or assumption. The members should be cautioned that there are certain limitations to the scope of their investigations; that each investigator should take into account that although a Petitioner's politics may be different from his own, and they may be of differing religious denominations, that these differences have no bearing on the evaluation of the Petitioner's qualifications for admission into the Lodge. So long as the Petitioner expressly believes in the existence of One Supreme Being, the investigator has no right to probe further and quiz the Petitioner about his church affiliation, or perhaps his lack of same.

Brother Albert G. Mackey said it well: . . . no other religious test is necessary or proper in the candidate, except that he declare himself a firm believer in the existence of a Supreme Being." For the investigator to probe further than this on this question is to turn his inquiry into an inquisition, which would be highly un-Masonic on his part.

Likewise, if one is a Democrat and the other a Republican, this is of absolutely no consequence and should not even be discussed. (Note: in matters political it should be borne in mind that the Communist Party is not a bona fide political party but is held to be an instrument of a foreign power inimical to both the American way of life and to Freemasonry.) Partisan politics and sectarian religion are forbidden subjects in every Masonic Lodge and every Freemason knows this, or should know it.

The investigator should be strongly advised that after a thorough and painstaking investigation, and after he has exhausted all known sources of information, if he is still possessed of doubts of the Petitioner's qualifications, he should always, without variation or hesitation, resolve his

doubts in favor of Freemasonry and the Lodge and *not* in favor of the Petitioner. No man has a *right* to become a Freemason; it is a privilege controlled at the ballot box.

No attempt is made in these pages to go into the techniques of successful investigations. No specific rules would be applicable everywhere. Generally speaking, all sources of information should be explored which would lead to a complete picture of the Petitioner. He should be a man who first has Freemasonry in his heart, a man of unimpeachable character who enjoys a good reputation among his friends, neighbors, acquaintances and associates wherever he is known. It should be made clear to him, and possibly to his wife, that if he is accepted into the Fraternity, he must sacrifice some time and energy which call for evenings away from home. He should be a man who has a record for paying his just debts and living up to his word, who has no record of living a dissolute life or having immoderate habits. He should have no criminal record. He should have sufficient education to be able to grasp and retain the precepts of Freemasonry as taught him in the lodge. He must be literate and sufficiently fit physically to participate in the degrees. He must have filed his Petition for the mysteries of Freemasonry of his own free will and accord and not from any improper solicitation of friends. He must be unbiased by any mercenary motives. He should not view the Craft Lodge as being nothing more than a stepping stone for what he thinks is something more desirable or where he can have more fun, but where admission is dependent upon his being a member of the Lodge and in good standing.

All these are areas to be explored in detail by the investigator. Such inquiry should be conducted with the utmost tact, discretion, and as diplomatically as possible. Derogatory information developed from the investigation does not become a subject for later gossip and rumors and talk to the detriment of the Petitioner whether he be accepted or rejected.

A negative investigation is utterly worthless. It is not acceptable to file a favorable report because the investigator talked to a number of persons who said "I never heard anything against him." An investigator might talk to scores of people who could say that much. What the investigator is looking for are *positive* statements attesting to the Petitioner's good name, or his bad name, as the case may be.

What are the advantages of Masonic investigation? The answers, while obvious, warrant repetition: to preserve the reputation of the Craft, to ensure harmony, promote our advancement and our progress in our service to God and man, to maintain our reputation before the world, and to confound our enemies by accepting none but good men and making better men of them, men whom we are proud to address as "Brother," men who can be counted on to practice fidelity even unto death, if need be, to keep the faith of our Masonic ancestors and to pass it on, unsullied, to our Masonic descendants. Make Freemasonry hard to get into; don't sell it cheaply. Worthy men, and worthy men only, are the ones we want. We cannot afford less.

Not only is your own Lodge dependent on you as a successful investigator; so are your neighboring lodges, your Grand Lodge, and Freemasonry the world over. This is a universal Brotherhood; what affects one affects all. When you admit a man to the degrees and to the status of Master Mason, you are opening thousands upon thousands of doors to him over the Masonic world. You are giving him the right to wear the Square and Compasses and to have a claim upon the kindnesses of millions of Freemasons. Let us never forget one of the great maxims of

Freemasonry: "Careful inquiry into the physical, intellectual, and moral fitness of every candidate for the mysteries of Freemasonry is indispensable."

All components of the Craft look to you, the Investigator, for the security and well-being of our beloved Fraternity. You are under the gravest of obligations to discharge your duty to the very best of your ability. When you have accomplished this duty with efficiency, zeal, and impartiality, you will have rendered your Brethren, wherever dispersed, an invaluable service. You will have complied with the dictates of your own conscience and the Masonic law which specifies your duty in this field.

Your compensation will be the satisfaction of a job well done and the knowledge that you have been the eyes and ears of the Craft during this period. Whether spoken or not you will have earned the gratitude of your Brethren.

You, the Investigator, have a solemn responsibility. Look well to it!

OUTLINE for a TALK

I. Introduction

II. Definition of Subject

III. The Investigator

A. Honor

B. Carefulness

C. Potentials of petitioner

D. Pitfalls to avoid

E. Qualifications of

IV. Investigation

A. Selecting committee

B. Meeting for instruction

C. Politics and religion NOT investigated

D. Individual reports

E. Qualities required of petitioner

F. General principles

V. Values of Investigation

A. To the Lodge

B. To others

C. To universal Masonry

VI. Conclusion: a Charge to Investigators.