

**AFFILIATED BODIES  
ADMINISTRATIVE HANDBOOK**

**FOR LODGES, CHAPTERS, PRONAOI, AND  
ATRIUM GROUPS**

24 February 2021

## **Table of Contents**

|   |    |
|---|----|
| <b>SECTION 1: Mission and Roles</b>                                 | 5  |
| <b>SECTION 2: Introduction to the Handbook</b>                      | 6  |
| <b>List of Common Abbreviations and Terms</b>                       | 6  |
| <b>Organizational Chart</b>   | 7  |
| <b>Purpose and Role of the Affiliated Body</b>                      | 7  |
| <b>SECTION 3: Organization and Requirements</b>                     | 8  |
| <b>Affiliated Body Organization, Officers, and Other Volunteers</b> | 8  |
| <b>Table 1: Affiliated Body Size, Officers, and Volunteers</b>      | 8  |
| <b>Reporting and Administrative Requirements</b>                    | 9  |
| <b>Table 2: Reporting Deadlines (in Rosicrucian Year order)</b>     | 9  |
| <b>Table 3: Functional Administrative Requirements</b>              | 10 |
| <b>Convocation and Special Ritual Requirements</b>                  | 10 |
| <b>Table 4: Monthly Convocation Requirements</b>                    | 10 |
| <b>Table 5: Special Rituals</b>                                     | 11 |
| <b>SECTION 4: Selection of Officers</b>                             | 11 |
| <b>How to Approach Candidates</b>                                   | 12 |
| <b>Multiple Offices and Terms of Office</b>                         | 12 |
| <b>SECTION 5: Administrative Officers and Duties</b>                | 13 |
| <b>Definitions and General Information</b>                          | 13 |
| <b>Officer Qualities</b>  | 14 |
| <b>Officer Positions and Roles</b>                                  | 15 |
| <b>Master or Group Leader (GL)</b>                                  | 15 |
| <b>Deputy Master (DM)</b>   | 17 |
| <b>AB Secretary (Archivist) or Guardian</b>                         | 17 |
| <b>Board of Trustees Chairperson</b>                                | 19 |
| <b>Board of Trustees Secretary</b>                                  | 19 |
| <b>Treasurer / Board of Trustees Treasurer</b>                      | 20 |
| <b>SECTION 6: Financials</b>  | 21 |
| <b>Maintaining Financial Records</b>                                | 21 |
| <b>Investments and Property</b>                                     | 23 |
| <b>Loans</b>  | 24 |
| <b>Insurance</b>  | 24 |

|   |    |
|---|----|
| <b>Setting up New ABs</b>                                     | 24 |
| <b>Employer Identification Number</b>                         | 25 |
| <b>Bank Accounts</b>  | 26 |
| <b>Table 6: Bank Account Signature Authority</b>              | 27 |
| <b>Sales Tax</b>  | 27 |
| <b>Federal Tax Reporting Requirements</b>                     | 28 |
| <b>SECTION 7: Administrative and Business Meetings</b>        | 28 |
| <b>Table 7: Meeting Frequencies</b>                           | 28 |
| <b>Administrative Officers’ Team Meetings</b>                 | 29 |
| <b>Table 8: Administrative Officers’ Meeting Requirements</b> | 29 |
| <b>Affiliated Body Business Meetings</b>                      | 29 |
| <b>Table 9: Business Meeting Requirements</b>                 | 29 |
| <b>General Guidelines for Both Types of Meetings</b>          | 29 |
| <b>Order of Business</b>                                      | 30 |
| <b>Order of Motions/Votes</b>                                 | 30 |
| <b>SECTION 8: Affiliated Body Operations</b>                  | 31 |
| <b>The Charter</b>  | 31 |
| <b>Public Contact Information</b>                             | 31 |
| <b>Emergency Plans</b>  | 31 |
| <b>Committees</b>   | 32 |
| <b>AMRA and Dues</b>  | 32 |
| <b>Solicitation of Funds</b>                                  | 33 |
| <b>Member Conduct</b>   | 33 |
| <b>Confidentiality and Privacy</b>                            | 34 |
| <b>Radius Lists</b>   | 35 |
| <b>Newsletter</b>   | 35 |
| <b>Meeting Space and Moving to a New Location</b>             | 36 |
| <b>SECTION 9: Affiliated Body Programs</b>                    | 36 |
| <b>Affiliated Body Greeters</b>                               | 36 |
| <b>Public Opportunities</b>                                   | 37 |
| <b>Mystical Weekends</b>                                      | 38 |
| <b>Discourses, Experiments, Presentations, and Messages</b>   | 38 |
| <b>General Ritualistic Procedures</b>                         | 39 |

|   |    |
|---|----|
| <b>Convocation</b>  | 39 |
| <b>Affiliated Body Initiation /Affiliation</b>                  | 40 |
| <b>Temple Degree Initiations</b>                                | 40 |
| <b>Colombes</b>   | 40 |
| <b>Other Ceremonies and Rituals</b>                             | 41 |
| <b>Table 10: Funeral and Burial/Cremation Rituals</b>           | 41 |
| <b>Destruction of Monographs</b>                                | 41 |
| <b>SECTION 10: Technical Resources</b>                          | 42 |
| <b>Electronic Equipment</b>                                     | 42 |
| <b>Web Resources</b>  | 42 |
| <b>Leveraging Web Resources</b>                                 | 42 |
| <b>Web and Social Media Volunteers</b>                          | 43 |
| <b>Slack</b>  | 43 |
| <b>Rosicrucian Community</b>                                    | 43 |
| <b>Facebook</b>   | 43 |
| <b>Meetup</b>   | 44 |
| <b>SECTION 11: Miscellaneous</b>                                | 44 |
| <b>Official Logo</b>  | 44 |
| <b>Letterhead/Stationery and Communication Guidelines</b>       | 44 |
| <b>SECTION 12: Regional Committees and Grand Lodge Officers</b> | 45 |
| <b>Regional Committees</b>                                      | 45 |
| <b>Grand Lodge Officers</b>                                     | 46 |
| <b>Grand Councilors</b>   | 46 |
| <b>Regional Monitors</b>  | 47 |
| <b>SECTION 13: Purpose and Mission Statements</b>               | 47 |
| <b>English Grand Lodge for the Americas</b>                     | 47 |
| <b>How to Write a Mission Statement</b>                         | 48 |
| <b>Regional Committee Mission Statement Sample</b>              | 49 |
| <b>Affiliated Body Mission Statement and Goal Samples</b>       | 49 |

## **SECTION 1: Mission and Roles**

The mission of the English Grand Lodge for the Americas of the Rosicrucian Order, AMORC is to preserve and perpetuate the Rosicrucian teachings and to contribute to the evolution of consciousness.

The Affiliated Bodies serve as the living expressions of the Rosicrucian Order's mission at the local level by presenting inspiring Rosicrucian rituals and ceremonies, by creating a safe community for members and seekers to study and practice the Natural Laws governing the Universe, and by representing the Rosicrucian ideals in the community.

Regional Committees serve as resource centers for their Affiliated Bodies, sponsor region-wide programs for members and the public, provide administrative and ritualistic training for officers, and help ensure consistent local public relations efforts. They also help the Grand Lodge do the Great Work of spreading the Light of the Rosicrucian Order through public relations and promotional activities at the local level.

### **Mystical Aspects of an Affiliated Body**

The mystical role of an Affiliated Body is one way the sacred triangle of Light, Life, and Love manifests in our world. The Light from the East in our Temples comes into contact with the members, the Life, and manifests in them as Love, which can be used in a practical way in each member's life to bring vitality into the community. One primary purpose of this handbook is to help each Affiliated Body operate harmoniously so members can let their Light shine and be a radiant source of Light and Love in their communities.

So Mote It Be!

## **SECTION 2: Introduction to the Handbook**

This Affiliated Bodies' Administrative Handbook should be read and understood by all incoming Officers before they take office. The Officer's Oath in the installation ritual refers to this handbook and the documents and resources referenced herein, which should have everything needed for the day-to-day running of an Affiliated Body (AB). The contents of this handbook supersede all previous versions; please access and use the most current version available in the AB Online Resources Portal at [amorc.customerhub.net](http://amorc.customerhub.net). Do not alter the handbook. If you have questions about the contents, suggestions for improvements, or know of additional helpful resources, please communicate these using the #affiliated-bodies-handbook channel in Slack.

We wish you all success and our very best wishes for Peace Profound.

*The English Grand Lodge for the Americas*

### **List of Common Abbreviations and Terms**

AB – Affiliated Body  
AOM – Administrative Officers' Meeting  
BoT – Board of Trustees or “Board”  
DMS – Direct Message (in Slack)  
EGL – English Grand Lodge for the Americas or “Grand Lodge”  
GC – Grand Councilor  
GL – Group Leader  
RM – Regional Monitor  
ROQ – Recommended Officer Questionnaire (form)  
WV – Web Volunteer  
SMV – Social Media Volunteer

AB Online Resources Portal – a section of the [amorc.customerhub.net](http://amorc.customerhub.net) site reserved for Officers, Ritual Directors, Colombe Advisors, potential officers, and volunteers where they can access materials to facilitate performance of their roles and responsibilities

AMRA (Law of) – passing along to others some portion of the blessings you have received

Google Drive – cloud storage space for all files other than Quarterly and Annual Reports and bank statements (such as ROQ and Deputy Master's Folio)

Mystical Weekend – a weekend event offering multiple rituals, convocations, and learning experiences for members and/or the public, generally sponsored by a Region or local AB

Officer – a member who serves the Affiliated Body, Region, or Grand Lodge in an official administrative or ritualistic capacity.

OneDrive – cloud storage space for Quarterly and Annual Report (Excel) spreadsheets and redacted bank statements

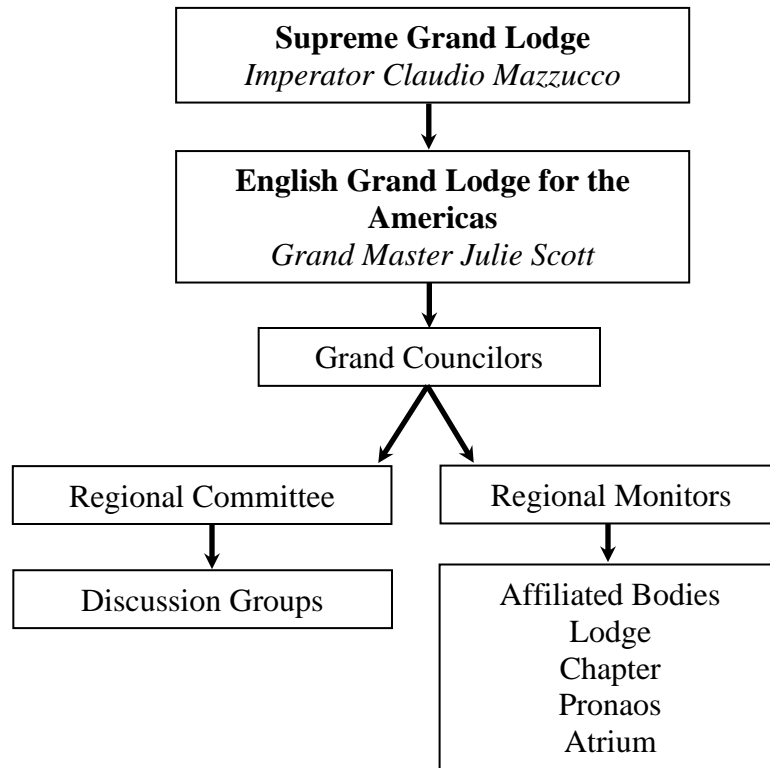
Region – an area including one or more States served by a Grand Councilor

Slack – internet-based, real-time business communications tool used to reduce email and streamline communications

State (or state) – general term used to refer to a State, Province, Territory, or other geopolitical subdivision of a country

# Organizational Chart

Ancient and Mystical Order Rosae Crucis, AMORC



## Purpose and Role of the Affiliated Body

The primary purpose of Affiliated Bodies (ABs) is to carry out the ritualistic work of the Order and to provide in-depth study opportunities for Rosicrucian members. A secondary purpose is to aid in the Order's mission to make the teachings available to all interested seekers.

Affiliated Bodies provide members a depth and richness of ritual not found in home sanctum study. They offer members the opportunity to participate in the Great Work of the Order through involvement in group meditation and visualization work. They provide members with the opportunity to enjoy discussions, exercises, and discourses that deepen their understanding of the principles presented in the monographs. As energy, resources, and circumstances permit, Affiliated Bodies also provide engaging programs for non-members.

Though Affiliated Bodies inevitably have a social character, social events at ABs must always be secondary to the overriding main purpose expressed above. Often it leads to more harmony by not offering social events with no specific purpose or discussion topic. The spirit of the Order must be clearly manifested in an Affiliated Body at all times, and no activities resulting in inharmonious behavior or acrimonious debate may be allowed to persist.

### SECTION 3: Organization and Requirements

#### Affiliated Body Organization, Officers, and Other Volunteers

The four types of Affiliated Bodies are Lodge, Chapter, Pronaos, and Atrium Group.

The type of AB depends on the number of Active members, defined as those who attend AB events at least once a month and give support through AMRA or dues if the AB is on a dues system. Supporting members are those who infrequently or never attend but who give support through AMRA or dues if the AB is on a dues system. Only Active members are counted to determine AB type.

As Lodges and Chapters have larger memberships and own property (building and/or accoutrements used in rituals and ceremonies), they have a Board of Trustees (BoT) responsible for the financial and physical affairs of the AB.

**Table 1: Affiliated Body Size, Officers, and Volunteers**

| AB Type                        | Lodge   | Chapter | Pronaos  | Atrium Group   |
|--------------------------------|---|---------|--|--|
| Active Members*                | 30  | 20      | 7  | 3  |
| Administrative Officers Team   | <ul style="list-style-type: none"> <li>• Master               <ul style="list-style-type: none"> <li>○ Deputy Master (has no voting rights)</li> </ul> </li> <li>• AB Secretary</li> <li>• BoT Chairperson</li> <li>• BoT Secretary</li> <li>• BoT Treasurer</li> </ul> |         | <ul style="list-style-type: none"> <li>• Master</li> <li>• Archivist (Secretary)</li> <li>• Guardian (Treasurer duties as assigned)</li> </ul> | <ul style="list-style-type: none"> <li>• Group Leader</li> <li>• Guardian (may also serve as the Secretary-Treasurer)</li> </ul> |
| Other Volunteers (as possible) | <ul style="list-style-type: none"> <li>• Social Media Volunteers</li> <li>• Greeters</li> <li>• Technicians – audio/visual (AV) equipment, computer, etc.</li> <li>• Committee Chairpersons and Members</li> </ul>  |         |  |  |

\*Number of Active Members required to maintain status.

**Discussion Groups** are not Affiliated Bodies although they are a great first step toward developing an AB. Discussion Groups are small gatherings of Rosicrucians and non-members who meet periodically to discuss topics of interest and how they relate to Rosicrucian principles. There are no officers or administrative requirements, and formation of a group is generally facilitated by the Grand Councilor or Regional Committee.

**Rosicrucian Initiatic and/or Cultural Centers** are administered by the Grand Lodge and may be formed if a Region has a dedicated Temple but does not have the resources to effectively manage it. Contact the Grand Lodge regarding the possibility of becoming a Regional Rosicrucian Initiatic Center or Rosicrucian Cultural Center.



## Reporting and Administrative Requirements

The Rosicrucian year begins in March; however, financial records are maintained on a calendar year schedule. Failure to meet the following deadlines may result in suspension of the AB's charter. Each item applies to all Affiliated Bodies unless specifically noted otherwise.

### Description of items:

- 990-N (e-postcard) or 990 long form must be filed annually with the IRS by US-based ABs to maintain non-profit status.
- Quarterly and Annual Reports are Excel templates on Microsoft OneDrive and are not considered complete until bank statement(s), redacted to show only the last four digits of the account number, are electronically delivered to the EGL via Slack.
- The ROQ (Recommended Officer Questionnaire) form is to be completed for the upcoming R+C year with each Officer's contact information. It is available from the AB Online Resources Portal and should be saved on the state's Google Drive.
- The Deputy Master Planning Folio is a template used to plan the upcoming year and to evaluate if the Deputy Master is ready to serve as the Master the next year.
- Insurance & Administrative Fee – ABs reimburse the EGL for liability insurance paid on their behalf and remit a small administrative fee to offset some of the EGL's costs related to ABs.

**Table 2: Reporting Deadlines (in Rosicrucian Year order)**

| Item  | Deadline    | Location / Notes  |
|---|-------------|---|
| 990-N (e-postcard) or 990 (long form) (U.S. ABs only)           | May 15      | IRS Website   |
| 1 <sup>st</sup> Quarter Report with March bank statement(s)     | May 15      | Complete reports in OneDrive; DMS (Direct Message in Slack) bank statements to EGL          |
| 2 <sup>nd</sup> Quarter Report with June bank statement(s)      | August 15   | Complete reports in OneDrive; DMS bank statements to EGL                                    |
| 3 <sup>rd</sup> Quarter Report with September bank statement(s) | November 15 | Complete reports in OneDrive; DMS bank statements to EGL                                    |
| 4 <sup>th</sup> Quarter Report with December bank statement(s)  | February 15 | Complete reports in OneDrive; DMS bank statements to EGL                                    |
| Recommended Officers Questionnaire (ROQ)                        | October 31  | State's Google Drive  |
| Deputy Master Planning Folio (Lodges & Chapters only)           | October 31  | State's Google Drive  |
| Insurance & Administrative Fee                                  | February 15 | Pay by credit card or electronic withdrawal; no checks                                      |
| Annual Report with December bank statement(s)                   | February 28 | Complete reports in OneDrive; DMS (electronically) signed report and bank statements to EGL |

**Table 3: Functional Administrative Requirements**

| Function                                    | Date   | Notes   |
|---|--|---|
| Administrative Officers' Meeting            | Monthly – Lodges/Chapters<br>Quarterly – Pronaoi | Near beginning of month or quarter*                       |
| AB Business Meetings                        | Quarterly, after first convocation of quarter    | Atrium Groups are excluded from this requirement          |
| Regional Committee Meeting                  | Scheduled by GC                                  |   |
| Bank Signature Cards for change of Officers | April 15   | Appropriate AB officers; GC has sole signatory authority  |
| Officers' dues checked before installation  | March, well before New Year's Ceremony           | Two officers; each officer's credentials must be verified |
| Website/Social Media Updates                | Monthly  | See " <a href="#">Technical Resources</a> "               |

\* For Atrium Groups, meeting frequency may be adapted upon approval by RM and GC.

### Convocation and Special Ritual Requirements

All ABs are required to hold at least one (1) Convocation or Ritual, appropriate for the AB type, each month. Additional Convocations or Rituals may be held, and Lodges and Chapters may present a stand-alone Pronaos Convocation as an additional ceremony if desired. ABs may also present a Council of Solace for non-members at any time, although it may not take the place of the required Convocation or Ritual for the month.

**Table 4: Monthly Convocation Requirements**

| AB Type      | Monthly Requirement*           |
|--------------|--------------------------------|
| Lodge        | At least 1 Lodge Convocation   |
| Chapter      | At least 1 Chapter Convocation |
| Pronaos      | At least 1 Pronaos Convocation |
| Atrium Group | At least 1 Atrium Ritual       |

\* A Special Ritual (see below) may replace a monthly requirement

Special Rituals are ideally held on the exact date of the solstice or equinox as there are specific energies on those dates with which the Rituals are meant to attune. (See [Table 5](#) on the next page.) For example, the Festival of Light refers to the energy of the Winter Solstice (which always falls between December 19 and 22) so it is not appropriate to present that ceremony and meditation the first week of December.

Every effort should be made to present the Special Rituals on the EXACT DATE, even if it is not a "regular" meeting time for the AB. If a Special Ritual cannot be held within a day or two of the exact date, it should not be presented. The Mediation for Peace must be on the 4<sup>th</sup> Sunday in June.

**Table 5: Special Rituals**

| <b>Special Ritual</b>                       | <b>Applies to</b>  | <b>Month</b> | <b>Time of Month</b>     |
|---|--|--------------|--------------------------|
| Colombe Ceremony                            | Lodge, Chapter   | May          | Any May Convocation      |
| Thanksgiving                                | Lodge, Chapter   | June         | Summer solstice          |
| Peace Day Ceremony                          | All  | June         | Fourth Sunday in June    |
| Memorial “Pyramid” Ceremony                 | All  | September    | Fall equinox             |
| Festival of Light                           | Lodge, Chapter, Pronaos                                      | December     | Winter solstice          |
| Pythagorean Ritual                          | Lodge, Chapter   | February     | Any February Convocation |
| Rosicrucian New Year & Officer Installation | Lodge, Chapter, Pronaos (Atriums do not do the installation) | March        | Spring equinox           |

**SECTION 4: Selection of Officers**

The annual Selection of Officers is a team process involving the Administrative Officers, Regional Monitor, and Grand Councilor. Here is the recommended procedure:

- a. Schedule an Officer Selection meeting in July or August when all Administrative Officers can attend. (It should be early enough to allow candidates some time to consider accepting a position and to approach multiple candidates, if necessary, before the ROQ [Recommended Officer Questionnaire] is due in October.) The BoT Secretary (or Secretary if no BoT) invites the GC and RM.
- b. Hold discussions and make recommendations for new officers. The Grand Councilor and Regional Monitor play an important role in this process and should be involved in the discussions. Candidates should be selected and recommended by consensus or by majority vote of the Administrative Officers if a consensus cannot be reached. Ideally, at least three candidates should be recommended for each open position. It is important to recommend candidates who can work with others successfully.
  - i. For a Lodge/Chapter, all five voting Administrative Officers, the Deputy Master, and the Regional Monitor should be present and involved in discussions. The Grand Councilor may be present if they so desire.
  - ii. For a Pronaos, all three Administrative Officers and the Regional Monitor should be present and involved in discussions.
  - iii. For an Atrium Group, the Group Leader and any assisting officers should work with the Regional Monitor to develop the list of candidates.
- c. Submit the list(s) of recommended candidates in preferred order for each open position to the Regional Monitor and Grand Councilor for approval. If the first recommendation for the position is not approved, the second will be considered, etc., before the list of approved candidates is returned to the Administrative Officers.
- d. Approach the candidates to discuss potential service (see segment below on “How to Approach Candidates”).

- i. For a Lodge or Chapter, the Master approaches candidates for Chairperson, BoT Secretary, and BoT Treasurer while the Chairperson approaches candidates for Master, Deputy Master, and AB Secretary.
  - ii. For a Pronaos or Atrium, the Master or Group Leader approaches the candidates.
  - iii. Ensure each candidate has access to the Administrative Handbook and Oath of Office to review, preferably via the AB Online Resources Portal.
- e. If needed, the Administrative Officers reconvene to discuss responses from the approached candidates and make a final decision for each position.
  - f. Approach the final candidate(s) for confirmation and request they complete an online ROQ for the AB, which should be set up to save to the AB's or State's Google Drive. (The AB Online Resources Portal has a link to copy and customize the form for the AB or State.)
  - g. Unless a Grand Lodge representative contacts the AB, the final candidate(s) are approved.
  - h. Complete and post the composite ROQ list for the AB on the State's Google Drive.
  - i. Ensure all pertinent information is passed on to the new Officers, including financial records and details, internet passwords, procedures, etc. If possible, outgoing officers should help train the incoming officers.

### **How to Approach Candidates**

Avoid giving an individual the impression that they have already been selected for a particular office. Say something like: "You are among a number of members the Officers are considering – if selected, would you consider serving as an Administrative Officer? If the member expresses an interest in serving, discussion may proceed.

Also make it clear the nomination is only pending as the Grand Lodge needs to approve nominations before a final selection can be made.

### **Multiple Offices and Terms of Office**

A member may be an Officer for more than one AB at the same time as long as they are willing to serve and are approved by the Administrative Officers of each AB and by the Regional Monitor(s) and Grand Councilor(s) of the Region(s) in which the ABs are located.

The basic Term of Office is listed for each position. Incumbents may serve additional term(s) of office as long as they continue to display exemplary leadership qualities, are willing to continue in office, and have approval from the Administrative Officers, Regional Monitor, and Grand Councilor.

However, care should be taken to help ensure incumbents continuing in office and those holding office in multiple ABs do not suffer "burn-out" or start losing their passion for service to the AB or the Order. Consideration should also be given to providing opportunities for other members to serve; this allows more members to feel included (and possibly be more inclined to stay with the group), gain experience, and further their growth for their own benefit and for that of the AB and the Order.

For Pronaoi, the Archivist and Guardian positions should be on a staggered two-year term so both positions are not starting duties in the same year. This helps ensure a smoother transition as the

incoming officer(s) can be assisted by the existing officer. For a brand-new Pronaos, either the Archivist or Guardian will serve a two-year term and the other will serve only a one-year term. When the one-year term is over, the incoming officer serves a regular two-year term.

Board of Trustee positions each have two-year terms, and the term for one position should start the year before (or after) that of the other two positions. This again helps ensure a smoother transition as at least one of the officers will have experience and can assist incoming officer(s).

**SECTION 5: Administrative Officers and Duties**

**Definitions and General Information**

NOTE: Officer positions for all types of ABs are discussed in this section. Use the positions applicable to the AB type. An Atrium Group Guardian is generally the Secretary and/or Treasurer, but those duties may be assumed by the Master or assigned to another member if necessary.

Administrative Officer: a member who serves the Affiliated Body in an Administrative capacity. (Some positions, such as Master/Group Leader, carry dual administrative and ritualistic responsibilities. Please see the Ritual Handbook for information on Ritualistic Officers.)

Administrative Officers’ Team: a group consisting of all Administrative Officers for an AB, including the Board of Trustees if said entity exists:

| <b>Composition of Administrative Officers’ Team for:</b>  |  |  |
|---|--|--|
| <b>Lodge / Chapter</b>  | <b>Pronaos</b>   | <b>Atrium Group</b>  |
| <ul style="list-style-type: none"> <li>• Master               <ul style="list-style-type: none"> <li>○ Deputy Master (has no voting rights)</li> </ul> </li> <li>• AB Secretary</li> <li>• BoT Chairperson</li> <li>• BoT Secretary</li> <li>• BoT Treasurer</li> </ul> | <ul style="list-style-type: none"> <li>• Master</li> <li>• Archivist (Secretary)</li> <li>• Guardian (Treasurer duties as assigned)</li> </ul> | <ul style="list-style-type: none"> <li>• Group Leader</li> <li>• Guardian (may also serve as the Secretary-Treasurer)</li> </ul> |

Audit Committee: a team of three (3) members responsible for reviewing and verifying the accuracy and completeness of an Affiliated Body’s financial records and for (electronically) signing the Annual Report and Audit form before it is submitted to Grand Lodge. The Master or Group Leader may ask for volunteers.

Board of Trustees (BoT): a group of members who oversee all funds and property (building and/or accoutrements) of the Lodge or Chapter and hold these in trust for Grand Lodge. The BoT’s primary function is with the financial and physical affairs of the Affiliated Body; duties also include making sure the Master fulfills their functions within the AB.

Relationship of the Master and the Board of Trustees: The Master has general supervision over all administrative officers, including the Board of Trustees, and ensures peace and harmony are maintained within the group. The Master’s work is primarily with the esoteric functions of the Affiliated Body, with focus on all rituals provided by Grand Lodge, directing Convocations, and other matters particularly related to the Master position. The Master is ultimately responsible for all functions within an Affiliated Body.

The Administrative Officers Team is responsible for all administrative aspects of the Affiliated Body, including the proper management of AB assets, such as cash, investments, property, etc., and for the timely submission of tax returns and reports as required by the Internal Revenue Service and/or other regulatory agencies.

To help reduce paper management and our carbon footprint, Administrative Officers are strongly encouraged to use electronic forms, devices, and storage (such as OneDrive and Google Drive) to document and maintain all AB business, including the following types of required records:

- a. Financial (Treasurer)
- b. Activity Reports (convocations, special events, etc.) (AB Secretary)
- c. Membership attendance and new members (AB Secretary)
- d. Initiation records (Lodge/Chapter Secretary)
- e. Meeting minutes (BoT Secretary for Board meetings; AB Secretary for member business meetings)

All Administrative Officers are expected to join and regularly check messages and posts in the EGL's Slack workspace at: [rosicrucianorderamorc.slack.com](https://rosicrucianorderamorc.slack.com). Contact your Regional Monitor if assistance gaining access to the platform is needed.

### **Officer Qualities**

Officers are chosen because they have certain skills to assist the Order and its work. Necessary qualities include:

- Understanding of Rosicrucian teachings and principles
- Good leadership, judgment, responsibility, reliability, and foresight
- Ability to meet deadlines
- Communication skills, including the ability to maintain confidentiality
- Willingness to address challenging issues, as needed
- Willingness to serve with compassion and empathy
- Familiarity with (and/or willingness to learn) computer word processing and spreadsheet programs (e.g., Microsoft Word and Excel), Slack, and Google Documents and Forms
- Dedication to fulfilling commitments made to the Order; willingness to resign or be replaced should they be unable to fulfill the duties as prescribed by the Oath of Office

To be effective in their roles, Officers should:

- Regularly attend Convocations, lectures, forums, meetings, etc.
- Thoroughly understand duties, policies, and procedures and be willing to learn more
- Be competent with Internet use for communication, resources, and promoting the Order
- Foster member participation, cooperation, and commitment to attitudes of work and service
- Exemplify dignity and decorum in leadership
- Be punctual for all events (arriving sufficiently early to set up, etc.)
- Support fellow Officers and members
- Refrain from, and put a stop to, gossip
- Keep confidential information private
- Have enough time to commit to their office

## Officer Positions and Roles

### Master or Group Leader (GL)

Title: Master (Lodge, Chapter, Pronaos) or Group Leader (Atrium) – Public Title: Rosicrucian Group Manager

Reports to: Regional Monitor

Term of office: 1 year, renewable

Other requirements: Must have completed the Fourth Temple Degree.

The Master/Group Leader occupies the lead position in ongoing administrative and ritualistic work of the AB, which requires exemplary leadership qualities. The candidate should:

- Demonstrate excellence in Rituals; writing original discourses is encouraged
- Practice strict compliance with EGL rules and regulations; follow up with Treasurer to ensure all tasks are up to date, especially IRS reporting due dates
- Be a unifying and trusted figure in the AB
- Evidence knowledge and diligent application of Rosicrucian teachings and principles
- Demonstrate self-discipline and embody “The greatest tolerance in the strictest independence.”
- Be reliable and dependable
- Use their abilities to organize, cooperate, coordinate, and delegate
- Practice and role-model excellent stewardship
- Be willing to address challenging issues, as needed
- Have enough time to commit to their office

### Preparation for Service

- a. In Lodges and Chapters, the incoming Master consults the approved Deputy Master Planning Folio posted to the State’s Google Drive site the previous fall.
- b. In Atrium Groups and Pronaoi, newly selected Masters or Group Leaders should consult with and seek advice from the current Master or GL and the Regional Monitor (or Grand Councilor) to develop an Event Plan for the upcoming R+C year.
  - i. Use the EGL’s Annual Calendar on the AB Online Resources Portal or see [Table 4](#) and [Table 5](#) of this Handbook to ensure all appropriate Special Rituals are included in addition to regular Convocations and to help schedule Administrative and Business Meetings.
  - ii. Consider having an overall theme for the year, such as Service, Growth, Harmonization, etc.
  - iii. Include the discourse titles for the first quarter and work with your RM or GC for subsequent quarters.
  - iv. Ensure the Event Plan is reviewed and approved by the Regional Monitor and Grand Councilor well before the start of the Rosicrucian New Year to allow sufficient time to prepare and rehearse in order to provide excellent experiences for members and visitors.

## Routine Duties

- a. Work with the general membership and other Administrative Officers to ensure support, success, and cooperation for AB programs and activities.
- b. Consult your Planning Folio (or Event Plan for Pronaoi/Atrium Groups) regularly to review plans and prepare for programs and activities, and as a reminder of your responsibilities to the Affiliated Body.
- c. Check Slack messages and postings, AB email, and all other forms of communication at least every other day.
- d. Conduct convocations.
- e. Ensure scheduled events take place as advertised and begin and end promptly.
- f. Consult the Regional Monitor and receive permission from the Grand Councilor before closing the AB for holidays or canceling any scheduled program.
- g. Maintain a confidential and harmonious relationship with Officers and members. Make a particular point of meeting guests and welcoming new members to the group.
- h. Adopt an open-door policy, inform members of the Affiliated Body's activities, and always communicate to the members what you are planning.
- i. Make sure you have functional and reliable Committees (Food, Library, Welcome, etc.).
- j. In Pronaoi and Atrium Groups, organize and preside at Administrative Officers' meetings.
- k. Preside at Affiliated Body Business meetings.
- l. Be well prepared for meetings and focus the discussion on the issues.
- m. Pay attention to programs that encourage member participation. Group planning encourages collaborative decision making and gives a sense of belonging.
- n. In Lodges/Chapters, work closely with the Deputy Master to help them prepare for their future position as Master. In Pronaoi and Atrium Groups, work with your officers and once selected, work closely with the incoming Master/GL to help them prepare for their upcoming role.
- o. Work with the Web Volunteer to make updates to the AB's website on your State's section of [www.amorc.rosicrucian.org](http://www.amorc.rosicrucian.org).
- p. Work with the Social Media Volunteer to use [www.rosicruciancommunity.org](http://www.rosicruciancommunity.org) and your state's Facebook Group to promote events and reach out to members and seekers.
- q. Verify the dues paid-through date for continuing and incoming officers and record them on the current year's ROQ.
- r. Ensure the current year's ROQ is posted online by October 31 (may be delegated).
- s. In Pronaoi and Atrium Groups, ensure reporting deadlines are met. See [Table 2](#) or the Annual Calendar in the AB Online Resources Portal.
- t. Ask the Regional Monitor for assistance immediately if you feel unable to handle a situation.
- u. Ensure the Regional Monitor and Grand Councilor have the email addresses your Officers use to log in for their monographs so the Officers can be set up to access the AB Online Resources Portal for this Affiliated Bodies Handbook and the appropriate Convocations and Special Rituals.



## **Deputy Master (DM)**

Title: Deputy Master – Public Title: Deputy Group Manager

Reports to: Master

Term of office: 1 year, renewable

### Routine Duties

- a. The Deputy Master role is a period of preparation and training to serve as Master for a Chapter or Lodge and become completely familiar with the Administrative Handbook, web resources, administrative procedures, and Rituals.
- b. Work closely with the Master on all aspects of managing the AB.
- c. At least twice a year, preside as Master of the Lodge/Chapter or stand-alone Pronaos Convocation. When presiding in Lodge/Chapter Convocations, the DM wears the gray DM robe with no Master's cross.
- d. Request Temple Degree Initiation dates from the GC.
- e. Complete the DM Planning folio and submit to RM for review/approval. (Ask the RM for assistance to complete the folio if needed.)

### Guidelines

- a. Obtain a Deputy Master Planning Folio early so there is sufficient time to plan the program for your term as Master.
- b. Start discussions with, and seek advice from, the Master/Regional Monitor from the beginning of your preparatory year so the Planning Folio is complete and approved by its due date.
- c. The Master will assist in ensuring the role is properly understood and opportunities to implement worthwhile ideas are developed.
- d. The completed folio must be posted your State's Google Docs section of [www.amorc.rosicrucian.org](http://www.amorc.rosicrucian.org) by October 31. If you are not able to submit the Planning Folio on time, you may need to reconsider your readiness to serve as Master.

## **AB Secretary (Archivist) or Guardian**

Title: AB Secretary/Archivist or Guardian (Atrium) – Public Title: Secretary

Reports to: Master/Group Leader

Term of office: 2 years, renewable

NOTE: For some Pronaoi or Atrium Groups, the Archivist (Secretary) or Guardian positions may also be assigned Treasurer duties. If this is the case, be sure to review and follow the information for the Treasurer position.

### Routine Duties

- a. Check Slack messages and postings and all other forms of communication at least every other day.
- b. Manage AB correspondence / communications / announcements.
  - i. Work with other Officers to establish procedures regarding responsibilities for reading and responding to various types of communications (e.g., emails received

- in a generic account, requests for metaphysical aid, general inquiries) and follow up to ensure members and seekers obtain the information or assistance requested.
- ii. Read pertinent announcements and communications at AB meetings.
    1. Official communications from superior bodies or Officers must be read fully; use discretion regarding other communications. Communications containing sensitive communication should not be read at business meetings. Check with your RM or GC if needed.
    2. Read correspondence in this order: Emperor, Grand Master, Grand Lodge, Grand Councilor, Regional Monitor, other Affiliated Bodies, individual Members, and businesses.
  - c. Record and maintain accurate AB Business Meeting minutes for future reference and archival use; motions and action items, including who is responsible for completing the action, should be clear. Use electronic forms, devices, and storage (e.g., Google Drive) as much as possible to reduce the need for using or storing hard copy (paper) materials.
  - d. Manage and/or maintain all records of the Affiliated Body
    - i. For Lodges and Chapters, keep business meeting minutes, initiation records, communications, etc.
    - ii. For Pronaoi and Atrium Groups, keep Administrative meeting minutes in addition to the records listed for Lodges and Chapters.
  - e. Work with the Treasurer to maintain accurate financial records regarding all income and expenditures. Accuracy is vital to avoid auditing difficulties later.
    - i. All AMRA and/or dues paid by members for Affiliated Bodies operating on a dues-basis must be recorded. Members' records must be updated, in all formats in which these records are maintained, to reflect the paid-through date.
    - ii. Ensure complete substantiating records, including prior approvals, are on file for all financial transactions.
  - f. Maintain activity report files for the AB's records.
    - i. All AB activities must be documented regarding type of activity, attendance, date/time, presenter's name, etc.
    - ii. For convocations, clearly document discourse title, type of Convocation (Lodge/Chapter/Pronaos/Atrium) and speaker.
    - iii. Record attendance numbers at every event, especially Convocations and Meetings.
    - iv. Ensure records designate the membership status of attendees; member key numbers and active or supporting status are crucial for the Annual Report.
    - v. The activity report (e.g., convocation register) should be the first document in the file with minutes and other supporting documentation attached.
    - vi. Any AB business-related meeting held between officers should be recorded in the form of meeting minutes.
  - g. All AB files must be available at the request of the Regional Monitor or Grand Councilor.

#### Guidelines

- a. In a large group, the work of a Secretary can become particularly heavy; do not hesitate to ask the Master to appoint other members to assist; examples include a Dues Secretary, Supply Bureau, etc.

- b. Adhere to high standards of quality in both writing and presentation for all correspondence. If grammar and spelling aren't your strong suit, engage the aid of another member to proofread your work. Be cognizant of the need for confidentiality; if your proofreader isn't an officer, there will be items they cannot assist with. If available, use the AB stationery for correspondence.

### **Board of Trustees Chairperson**

Title: Chairperson – Public Title: Chairperson

Term of office: 2 years, renewable

Other requirements: Work closely with the Master

#### Routine Duties

- a. Attend all Administrative Officer and AB Meetings.
- b. Call, organize, prepare agenda for, and chair the monthly Administrative Officers' Meeting.
- c. Assume responsibility for upkeep and maintenance of the physical property of the AB, requesting help when needed.
- d. Ensure all items necessary for the maintenance of the AB's Charter are submitted on time to Grand Lodge representatives (see [Table 2](#)).
- e. Work closely with the Master and other Officers to coordinate Lodge/Chapter activities harmoniously.

#### Guidelines

- a. Do not make any independent decisions nor act independently.
- b. Discuss and share all AB matters, especially those requiring expenditures, with all Administrative Officers. High-cost expenditures (large purchases or repairs such as major plumbing, furniture, a new roof, HVAC, etc.) should be approved by the Board of Trustees and also need approval of the RM and GC. If uncertain as to the threshold amount requiring approval, check with your RM for guidelines.

### **Board of Trustees Secretary**

Title: Board of Trustees (BoT) Secretary – Public Title: Secretary

Reports to: Chairperson

Term of office: 2 years, renewable

#### Routine Duties

- a. Handle formal correspondence for the Board of Trustees.
- b. Perform the following duties with respect to Administrative Officers' Meetings (AOMs):
  - i. Use electronic forms, devices, and storage options (e.g., Google Drive) to reduce the need for paper copies and storage.
  - ii. Notify Officers, RM and GC of the time, place, and agenda.
  - iii. In advance of the meeting, provide Officers, GC and RM with a copy of the current meeting agenda and the minutes from the previous meeting with the Treasurer's report.

- iv. Attend all AOMs; preside in the absence of the Chairperson.
- v. Record minutes of the monthly and any special AOMs.
- vi. During the meeting, ensure the previous month's meeting minutes are approved by a vote of at least two officers. Although DMs have no vote, their opinion should be considered.
- vii. Read announcements and communications at AOMs.
  - 1. All letters from superior bodies or Officers must be read fully; use discretion regarding other communications; your RM and/or GC can provide guidance regarding this.
  - 2. Read correspondence in this order: Emperor, Grand Master, Grand Lodge, Grand Councilor, Regional Monitor, other Affiliated Bodies, individual Members, and businesses.
- c. Ensure the Regional Monitor and Grand Councilor have the email address the AB's Officers use to log in for their monographs so they can be set up to access the AB Online Resources Portal for this Affiliated Bodies Handbook and the appropriate Convocations and Special Rituals.
- d. Assist the AB Secretary when necessary.
- e. Unless the task is assigned to another member, maintain accurate records of all library books and any additional acquisitions.

### **Treasurer / Board of Trustees Treasurer**

Title: Treasurer – Public Title: Treasurer

Reports to: Chairperson (Lodge, Chapter) or Master/GL (Pronaos/Atrium)

Term of office: 2 years, renewable

NOTE: In Pronaoi and Atrium Groups, the Guardian or another officer may serve as Treasurer.

#### **Routine Duties**

- a. Attend all Administrative Committee and AB meetings.
- b. Use electronic forms, devices, and storage as much as possible for reports and records.
- c. Prepare Treasurer's Report each month prior to Administrative Committee meetings to be distributed with the Minutes.
- d. Maintain accurate financial records to help ensure Quarterly and Annual Reports can be completed easily and the Annual Audit runs smoothly.
- e. Post Quarterly and Annual Reports online in OneDrive by the reporting deadlines.
  - i. Bank statements (checking, savings, CD, etc.) and all financial reports with sensitive information are sent via Direct Message in Slack.
  - ii. Redact all but the last four digits of account numbers before sending bank statements and reports.
  - iii. See "[Reporting Requirements](#)" or the Annual Calendar in the AB Online Resources Portal for specifics.
- f. Ensure banking signatures are changed as soon as possible after a change of officers.
  - i. Prepare for this necessary transition as the new R+C year approaches.

- ii. EGL requires two signatures on checks, whether verified by the bank or not.
- iii. The Grand Councilor is authorized to act on behalf of the Grand Lodge and the AB at the Grand Master's direction and retains "sole signatory authority" on all AB bank accounts in their Region.
- iv. Each account should have this exact wording: sole signatory authority – Grand Councilor (name).
- g. Transactions (e.g., payments made, monies received) must be recorded in the month they occurred.
- h. Promptly (within 3 days maximum) deposit all monies after any meeting. It is imperative monies (cash and checks) from each day/evening session be accurately counted and deposited in the bank. A record for income from credit cards/PayPal, etc., should also be maintained in order to keep an accurate count of all income.
- i. Ensure all bills are paid promptly. Communication with the Secretary(ies) is particularly vital regarding payment of bills.
- j. Ensure checks have two Officer signatures and, except for monthly recurring expenses, that expenditures over \$100 are approved in advance.
- k. Reconcile bank statements by the 15<sup>th</sup> of the following month.
- l. If you need help with your duties, ask for it so you can stay caught up.

#### Guidelines

- a. It is strongly suggested the Audit Committee conduct a six-month audit, especially with a new treasurer in office, to verify the financial reports are being completed properly.
- b. Financial statements must include all income and expenses for that month. Do not wait until a monthly statement is received from the bank to record transactions.
- c. Work closely with the Secretary(ies) and agree on who is responsible for what tasks, particularly regarding dues. Unless it has been re-assigned, the AB Secretary is responsible for dues.
- d. Make sure you understand this sub-section, "Treasurer," and the entire following section, "Financials." Work with the previous Treasurer or the Chairperson (or Master/GL) or RM if anything is not clear.

## **SECTION 6: Financials**

### **Maintaining Financial Records**

#### **Record Keeping**

Grand Lodge requires the following financial documents (or electronic copies) be kept for a period of seven years:

- Annual Reports and Audits
- Bank statements
- Cancelled checks
- Financial records (Financial, Income, and Expense Journals)
- Tax records
- Treasurer's Reports

Post Quarterly Financial Reports in your state's OneDrive section. See [Table 2](#) or the Annual Calendar in the AB Online Resources Portal for dates and details for transmitting these. Always redact all but the last four digits of account numbers before sending bank statements in Slack.

The IRS 990-N (e-Postcard) or 990 long form must be filed by US-based ABs each year by May 15 to maintain the AB's non-profit status. If needed, ask the RM/GC or designee for guidance.

### **Financial Journal**

A Financial Journal is the main record of all income and expenses. Keep it neat and accurate. It must be available for review by other AB Officers, the Audit Committee, RM, and GC.

- a. A Financial Journal can be as simple as a checkbook register, or it may be kept electronically in a spreadsheet or accounting program.
  - i. If kept electronically, a backup of the Financial Journal should be made regularly and saved on a remote drive separate from the original.
  - ii. Sample spreadsheets set up by Regions to expedite accounting records and reports are available; check with your RM.
- b. If separate Income and Expense Journals are kept, maintain them simultaneously.

### **Income**

- a. All income must be recorded in the month in which it is received. This should be coordinated between the Treasurer and any and all other positions (e.g., Secretary, Dues Secretary, Supply Bureau) responsible for receiving money from members.
- b. Ideally, use pre-numbered receipts with carbonless copies.
  - i. Provide a receipt for all funds received from a member or visitor, especially if cash is received. If the person does not want a receipt, the information should still be entered in the receipt book.
  - ii. Receipts should contain enough detail to accurately attribute and track funds received.
  - iii. If the receipt is for sale of merchandise, record the sale amount, tax levied, and the total amount received to make payment of sales tax easier to calculate. The AB will need a resale license in order to sell supplies. (Be sure to charge tax on the sale of merchandise. If the purchaser does not pay tax, the AB is still liable for the payment of it.)
  - iv. Donations of \$250.00 or more (in a single transaction) must be acknowledged in writing (letter or email) by the AB or Region, including the following information:
    1. the amount of any money and/or a description (with no value given) of property donated, and
    2. whether or not any goods or services were provided in return for the donation; if goods or services were provided, a description and value of the goods or services must also be given.

### **Expenses**

- a. Payments may be made either by check or electronically. Debit cards are not allowed.
- b. Payments must clearly identify the bill or invoice being paid.

- c. Checks require two signatures, with the extraordinary exception of the Grand Councilor.
- d. Copies of bills or invoices should be kept for the AB's records as the Audit Committee must be able to associate payment with its corresponding bill or invoice.
- e. Do not pay bills using petty cash. Petty cash should be kept secure, preferably in a locked box or locked file cabinet.
- f. Except for monthly recurring expenses, expenditures over \$100 require prior approval at least by a vote of the Officers if the expense must be incurred before the membership can vote. Major expenditures, such as large purchases or repairs (major plumbing, furniture, new roof, HVAC, etc.) should be approved by the RM and GC. If unsure of the threshold amount requiring approval for major expenditures, check with your RM.
- g. Each year, the Region will pay the annual Insurance and Administrative Fees to the EGL, and the Region will be reimbursed by each Affiliated Body.

### **Bank Statements**

- a. Reconcile bank statements upon receipt, including recording any interest earned. Interest is income and should be noted on the reports as such.
- b. Copies of redacted bank statements are sent to the EGL via Direct Message in Slack as part of the Quarterly Reports (see [Table 2](#)).

### **Online Banking and Electronic Bill Payment**

All Affiliated Bodies, including those using paperless bank statements and online bill payment, must maintain accurate records for the Audit Committee to complete its work. Please adhere to the following rules for electronic record keeping:

- a. Electronic copies of all bank statements and bills must be downloaded monthly and stored in a location readily accessible to the Audit Committee.
  - i. Downloading may be done by the Treasurer or another person designated by the Administrative Officers.
  - ii. Files can be stored in an onsite AB computer (or tablet, etc.) or on OneDrive in a folder separate from the Quarterly/Annual reports.
  - iii. Files must not be stored on a member's personal computer or on the Affiliated Bodies Google Drive.
- b. To help keep these electronic records secure, redact bank account numbers before uploading to OneDrive.
  - i. Additional protection is available by password protecting the folder in which they are kept. This is done on OneDrive by selecting the folder, clicking on the "Share" button, and selecting the "Set password" option.
  - ii. Only the Administrative Officers, Audit Committee, RM and GC should have access to the OneDrive folder.
- c. It is the responsibility of the Administrative Officers to ensure electronic records are being properly maintained.

### **Investments and Property**

Proposals for the investment of funds or the purchase of property must be sent to the Grand Lodge for approval and/or comments. ABs may not invest in stocks or mutual funds. Property

purchases (for a Lodge building) must be approved by the Grand Lodge and are required to be paid for in full at time of purchase.

## **Loans**

### **Commercial/Private**

ABs are prohibited from securing either commercial or private loans, even for the purchase of a building. If a building is desired by the members, a separate building fund bank account should be opened and maintained until there are sufficient funds to purchase without the need for a loan.

### **Regional**

On rare occasions, the GC may request the Grand Master's approval for modest loans from Regional funds to a Lodge or AB that owns a building and is without sufficient funds for needed repairs. If the Grand Master approves, the GC calls a special Regional Meeting at which the loan is discussed and voted on by all members of the Regional Committee. Affiliated Bodies must be able to meet their ongoing expenses; loans may not be made for payment of rent or other routine expenses, and there must be relative certainty the AB will be able to repay the loan. If the loan is approved, a specified, brief time (e.g., less than 2 years) for repayment is noted.

## **Insurance**

### **Liability and Property Insurance**

The Grand Lodge purchases liability insurance for every AB in the EGL in order to ensure all Affiliated Bodies, the English Grand Lodge, and the Supreme Grand Lodge are properly protected.

The Grand Lodge pays for property insurance for some Affiliated Bodies who own their own premises. The following ABs pay their own property insurance:

- a. ABs owning their own property outside the United States
- b. ABs in Florida whose hurricane insurance would increase rates for all ABs
- c. ABs that for administrative reasons find it necessary to pay their own insurance.

Invoices for insurance and administrative fees must be paid by February 15 of each year.

### **Tenant Insurance**

ABs that own their premises may sub-let a portion to other organizations. Their tenants must procure a \$1,000,000 liability insurance policy, a copy of which is to be forwarded to the Grand Lodge each year. This policy must name as "additionally insured" the following:

1. The renting Affiliated Body, e.g., Nefertiti Lodge, AMORC
2. The Grand Lodge of the English Language Jurisdiction of the AMORC, and
3. The Supreme Grand Lodge of AMORC

### **Setting up New ABs**

If the AB does not own its premises or is not the sole renter for its space (ensuring private mail delivery), then it should rent a post office box for official mail or use the Region's mailing address. A member's home address should not be used.



From a fiscal standpoint, setting up a new AB entails the following steps:

- a. Obtaining a unique Employer Identification Number (EIN), if in the United States
- b. Opening a bank (checking) account with appropriate signatory authorities
- c. As needed, obtaining the following from the state:
  - i. Sales Tax Permit (to be able to sell merchandise and collect and remit tax)
  - ii. Sales Tax Exemption Certificate (to not pay tax on items purchased for resale)
  - iii. Registration as a Non-Profit Organization (to not be subject to state income tax)

## Employer Identification Number

A new AB must obtain its own Federal Employer Identification Number (FEIN) before a bank account can be opened in its name. The FEIN is also known as the Federal Tax Identification Number or Employer Identification Number (EIN).

- a. **Never** use the Grand Lodge's EIN.
- b. Grand Councilors serving a multi-state Region should maintain separate EINs for each state, rather than creating one multi-state EIN. Multiple EINs can be easily managed under one IRS login profile.
- c. To apply for an EIN online, start with the following link: <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>. The general guidelines below are for completing the online application (as of August 2020):

Screen 1 (1.Identity – What type of legal structure...) – Select “View Additional Types, Including Tax-Exempt and Governmental Organizations”

Screen 2 (1.Identity – Additional types) – Select “Other Non-Profit/Tax-Exempt Organizations”

Screen 3 (1.Identity – Why requesting EIN) – Select “Banking Purposes”

Screen 4 (2.Authentication) – Enter your name and SSN/ITIN and select “I am a responsible and duly authorized member or officer having knowledge of this organization's affairs.”

Screen 5 (3.Addresses) – Enter the AB's physical address (not a PO Box), a contact telephone number, and your name as the “care of.” Note: If there is a different address to which mail should be sent, select the correct radio button and enter the information as requested.

Screen 6 (4.Details)

Legal Name – Enter (*Your Group Name*) – Rosicrucian Order AMORC

Trade Name – Enter (*Your Group Name*) AMORC

Start Date – Enter the date of your Organizational meeting

Screen 7 (4.Details – Tell us more about...) – Answer “No” to each question

Screen 8 (4.Details – What does your business...) – scroll to the bottom of the screen and select “Other”

Screen 9 (4.Details – You have chosen Other) – Select “Other” and enter Education

Screen 10 (5.EIN Confirmation) – Select the method by which to receive the EIN. (“Receive Letter Online” is recommended as long as you can open and save the pdf document to a location for the AB.)

- d. To apply for an EIN via postal mail or fax, go to: [www.irs.gov](http://www.irs.gov) and use “Search for a form or publication,” entering *form SS4*. Choose “PDF version of Form SS-4,” and use the instructions below to manually complete the form (applicable to Rev.12-2019):
- Line 1 – Enter “(Your group name) - Rosicrucian Order, AMORC”
  - Line 2 – Enter “(Your group name), AMORC”
  - Line 3 – Enter your name as the “care of” name
  - Line 4a-4b – Enter the Mailing (P.O. Box) address of your group
  - Line 5a-b – Enter the street address of your group if you have one already
  - Line 7a-b – Enter your name and SSN, ITIN, or EIN as the “Responsible Party”
  - Line 8a – Check “No”
  - Line 9a – Check “Other nonprofit organization (specify)” and enter *501(c)(3)*; then enter *1639* as the Group Exemption Number (GEN).
  - Line 10 – Check “Banking purpose (specify purpose)” and enter *Donations and Expenses*
  - Line 11 – Enter the date of your Organizational meeting
  - Line 12 – Enter December
  - Line 13 – Enter -0- for each type of employee
  - Line 16 – Check “Other (specify)” and enter Education
  - Line 17 – Enter Educational Services
  - Line 18 – Check “No”
- Keep a copy of the form for the AB’s records, and mail or fax the completed, signed form to the service center for your state, listed on the instruction sheet.
- e. Report the new EIN to the Grand Lodge as they must submit the new EIN number to the IRS for it to become active.

### **Bank Accounts**

- a. You will need the AB’s EIN (see preceding section).
- b. Try to use banks offering free checking for a non-profit organization.
  - i. If free checking is not available, ask for a small business account without fees.
  - ii. Check for hidden fees, such as an annual fee.
  - iii. Ask how to avoid recurring fees.
- c. The official account must read: “(Your AB/Group name), held in trust for Grand Lodge of the English Language Jurisdiction, AMORC, Inc.” If necessary, this may be abbreviated to “(Your AB/Group name), ITF the Eng. GL of AMORC.”
- d. The checks can read (Your AB/Group name), AMORC.
- e. Signatory authority must be assigned appropriately per the type of AB (see [Table 6](#) on next page).

**Table 6: Bank Account Signature Authority**

|  | <b>Lodge/Chapter</b>  | <b>Pronaos</b>  | <b>Atrium Group</b>   |
|--|---|---|---|
| Signatures required to be on file with financial institution | Five for all accounts:<br>Chairperson,<br>Treasurer, Master,<br>AB Secretary, GC  | Four for all accounts:<br>Master,<br>Secretary,<br>Guardian, GC | Three – Group Leader,<br>Guardian, GC; add RM if no<br>Guardian   |
| Who signs checks   | A Board of Trustees member and an AB Officer (e.g., Treasurer and AB Secretary)   | Two of the AB officers  | GL and Guardian or RM. If distances makes it impractical for RM to sign checks, the RM and GC may authorize another Officer to sign; they must be on file with the bank as a signer |
| Two signatures required                                      | Two signatures are required for all Affiliated Body checks.   |   |   |
| Sole Signatory Authority                                     | The Grand Councilor has “sole signatory authority” to be used in emergency or extraordinary circumstances and all bank accounts in their Region must have this exact wording: sole signatory authority – Grand Councilor ( <i>name</i> ). |   |   |
| Other  | Any fiscal transactions involved in setting up accounts as specified in this table are recorded and reported with suitable documentation in quarterly and annual reports, just as any other transactions                                  |   |   |

**Sales Tax**

A sales tax permit (also known as a resale license or vendor’s license) and remittance of sales tax collected will likely be required by the state if the AB sells merchandise (books, incense, etc.) to members or the public. It is best to collect tax on each merchandise sale so the AB can remit the tax collected instead of using its own funds to pay the tax due.

Check with the state’s Department of Revenue (or Taxation) for tax collection requirements, to obtain and submit proper forms for a permit, and for reporting and remittance requirements. For ABs outside of the United States, please check with your similar departments.

- a. The AB’s EIN will be needed for the form/s.
- b. The AB is the legal entity.
- c. If the AB is new and does not have a location address, leave that section blank and fill out the mailing address section.
- d. Each AB is a separate entity.
  - i. If the form asks for the number of business establishments in your state, enter 1 (one).
  - ii. If it asks how many in the USA, leave blank.
- e. There may be a fee; enclose a check for the exact amount or pay electronically, if possible.
- f. Date of first sale – enter the date of your charter or estimated first sales.

- g. Keep a copy for the AB’s records, and sign and send the original application to the appropriate address.

A separate Sales Tax Exemption Certificate may be required so the AB does not have to pay tax when purchasing items for resale. Check with your state for requirements. Tax will still need to be paid when purchasing equipment and supplies for use by the AB.

The AB may also need to register with the state as a non-profit organization to be exempt from state income taxes. Any state requirements for verifying or renewing non-profit status must be completed and met in a timely fashion.

**Federal Tax Reporting Requirements**

It is mandatory for each Affiliated Body and Regional Committee in the United States to have its own EIN (Employer Identification Number) to designate itself as a separate entity under the Grand Lodge umbrella. The EIN is for tax identification purposes only and does not mean an AB has employees. Having an EIN and being part of the EGL exempts the AB from Federal Income Taxes; however, the AB must annually file some variation of Form 990, Return of Organization Exempt from Income Tax. Filing must be completed before May 15 each year for the AB to retain its federal tax-exempt status.

NOTE: A new AB will not be able to file Form 990 until the Grand Lodge updates its list with the IRS, which is done each September. Until the IRS’s database is updated, the AB is not recognized as a non-profit organization, and it does not have tax exempt status.

Most ABs will be able to file Form 990-N (“e-Postcard”) found here: <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>. Follow the instructions in the online User Guide.

ABs with over \$50,000 in annual income will need to file Form 990-EZ (“short form”) or Form 990 (“long form”); start here: <https://www.irs.gov/charities-non-profits/form-990-series-which-forms-do-exempt-organizations-file-filing-phase-in>

**SECTION 7: Administrative and Business Meetings**

**Table 7: Meeting Frequencies**

| <b>Meeting Type</b>     | <b>Applies to</b>        | <b>Frequency</b>                               | <b>Approximate Date</b>                  |
|-------------------------|--------------------------|--|--|
| Administrative Officers | All                      | Lodge/Chapter – monthly<br>Pronaos – quarterly | Near beginning of each month or quarter* |
| AB Business             | All except Atrium Groups | Quarterly                                      | After first Convocation of quarter       |
| Regional Committee      | All Regions              | As needed                                      | Scheduled by GC                          |

\* For Atrium Groups, the meeting frequency may be adapted upon approval by RM and GC.

### Administrative Officers’ Team Meetings

**Purpose:** to discuss the plans of the Affiliated Body and the progress toward its goals, the performance of AB Officers, and the general well-being of the AB. Generally, officers discuss actionable business from the last business meeting and set the agenda for the AB business meeting.

**Table 8: Administrative Officers’ Meeting Requirements**

| Type of Group   | Frequency          | Quorum  | Presiding Officer | Other   |
|-----------------|--------------------|---|-------------------|---|
| Chapter / Lodge | Monthly mandatory  | Master or AB Secretary plus 2 Board of Trustees members | Chairperson       | BoT Secretary records minutes; reassigned if absent |
| Pronaos         | At least quarterly | 2 of the 3 Administrative Officers                      | Master            | Secretary records minutes; reassigned if absent     |
| Atrium Group    | As needed          | Group Leader, may be assisted by Guardian               | Group Leader      | Generally meets with RM or GC                       |

### Affiliated Body Business Meetings

**Purpose:** to solicit comments and discussion from members regarding the business, plans, and goals of the Affiliated Body. If needed, conflict resolution should occur separately.

Affiliated Body business meetings are to be held on premises, scheduled in advance, and publicized to the membership (in the State’s Slack channel, in a bulletin/email, etc.) The Regional Monitor and Grand Councilor must be advised if a scheduled meeting will not be held, or if an emergency dictates it must be held off-premises. If the business meeting must be held off-premises, it must occur in a public place only, not at a member’s home.

**Table 9: Business Meeting Requirements**

| Type of Group   | Frequency   | Quorum                                    | Presiding Officer            | Other  |
|-----------------|---|---|------------------------------|--|
| Chapter / Lodge | Quarterly mandatory; BoT may call special meeting | Master or AB Secretary plus 2 BoT members | Master                       | AB Secretary records minutes; reassigned if absent |
| Pronaos         | Quarterly mandatory                               | 2 of 3 Administrative Officers            | Master; if absent, Archivist | Archivist records minutes; reassigned if absent    |
| Atrium Group    | Determined by GL and GC                           | Group Leader, may be assisted by Guardian | Group Leader                 | Informal; run by consensus                         |

### General Guidelines for Both Types of Meetings

- Neither Administrative Officers’ Meetings nor AB Business Meetings may be held in the Lodge’s dedicated Temple. (Chapters do not have dedicated Temples.)

- If a Business or Administrative meeting is to be held in the same space in which rituals are held, dismantle the Sanctum before using the space for a meeting.
- AB Business Meetings may be held in the social area of a Lodge. If there is no private area for an Administrative Officers' Meeting, schedule a time in the social area when other members will not be present.
- If a meeting must be rescheduled, it should occur in the same month as originally scheduled with adequate advance notice given to all, including the RM and GC.
- Meetings are run according to Robert's Rules of Order.
- Decision-making is done by consensus if possible or a vote if not.
- Communications from Grand Lodge are to be read aloud during meetings (not during Convocations). These may be downloaded from Slack.
- If an Officer is absent from three consecutive meetings without prior notification, they may be asked to resign or be removed from office. If this is the case, the RM and GC must be notified, and the GC will notify the Grand Master.
- Grand Councilors and Regional Monitors do not serve as AB Officers nor do they have a vote in either meeting; they may make recommendations and suggestions. RMs and GCs should be informed when meetings are scheduled as it is recommended they attend both types of AB meetings.

### **Order of Business**

Administrative Officers' Meetings and Lodge, Chapter and Pronaos Business Meetings follow the schedule below. Atrium Group meetings may be informal but should cover any important issues in the list.

- Opening
- Invocation
- Roll call of Officers
- Approval of Previous Session's Minutes (motion, second, vote)
- Treasurer's Report (Administrative Officers' Meeting only), requires approval
- Communications
  - Superior Bodies / Officers
  - General
- Officer's Reports (Master, Treasurer, any others needed)
- Upcoming Deadlines (see Annual Calendar in the AB Online Resources Portal)
- Unfinished Business
- New Business
- Committee Reports
- Good of the Order
- Adjournment, requires approval

### **Order of Motions/Votes**

- Motion is made
- Motion is seconded
  - If not seconded, the motion is dropped

- Motion is discussed
- Presiding Officer calls for vote
- Vote is recorded

The Secretary (or acting Secretary) records the motion, who made it, who it was seconded by, relevant discussion points, and the result of the vote. Details must be recorded clearly so someone who was not present can read them and understand exactly what transpired.

## **SECTION 8: Affiliated Body Operations**

### **The Charter**

- Is a document issued by the Grand Lodge authorizing the operation of the group as an Affiliated Body of AMORC for as long as the group remains in good standing.
- Is to be suitably framed and placed in a conspicuous place in the AB quarters but not in the Temple itself. The Charter should be prominently displayed at each gathering.
- Remains in force unless the Affiliated Body closes or there is a breach of policy by the Affiliated Body. The Charter may be revoked at any time by the Grand Lodge if the AB fails to operate according to the rules and regulations of AMORC.

An Affiliated Body's Charter may be suspended if the following requirements are not met:

- Timely submission of the Annual Report and Audit to Grand Lodge (this is the primary formal requirement)
- Maintaining adequate membership
- Reimbursement of insurance premium and payment of Administrative Fee
- Timely submission of Quarterly Reports and bank statements
- For US ABs only, timely filing of appropriate IRS Form 990 series (e-Postcard, Short Form, or Long Form) plus proof of filing sent to EGL

### **Public Contact Information**

An established Affiliated Body must have a postal mailing address. Although an AB may use its own or the state's email account (e.g., california@amorc.rosicrucian.org) for general use, **the state's email address is the only one permitted on any AB's website.** Once established, email must be checked daily; likewise, voicemail, if used, should be checked daily. Each AB should have an assigned person to regularly collect the mail if a physical mailbox is used. Rapid, courteous, and informative responses to all inquiries are crucial to promote event attendance and AB growth.

### **Emergency Plans**

- The physical safety of Affiliated Body members is an important aspect of AB management and requires serious attention.
- The Master/Group Leader is responsible for ensuring all statutory safety requirements are met.

- If in doubt about any item, consult local safety and health websites.
- A working fire extinguisher shall be present whenever candles are used, and the ritual officers must be aware of its physical location and how to operate it.
- Each Affiliated Body must have emergency/disaster plans in place which:
  - Identify how to evacuate people from the Affiliated Body structure in the event of a fire or other emergency
  - Remind members to call 911 or the local emergency number as soon as possible
  - Assign specific duties for Officers to perform in the event of a disaster
  - Post the AB meeting address somewhere so the caller can inform emergency responders of the location
  - Provide for a quarterly review of the procedures
- Use the Incident Report Form found in the AB Online Resources Portal to report any emergency situation once the immediate danger has passed

### **Committees**

- Asking members to serve on committees is an excellent way to engage them with their Affiliated Body.
- Each active committee reports at the Business Meeting; reports become a part of the meeting minutes.
- Examples of committees are Audit, Culture and History, Housekeeping, Library, Maintenance, Membership, Metaphysical Aid, Refreshments, Social Media, Transportation, Visiting, etc.
- Special committees may be appointed by the Master for special purposes.

### **AMRA and Dues**

- AMRA is defined as “compensation by passing along to others some portion of the blessing you have received.” Affiliated Bodies operating under the Law of AMRA allow members to search their own hearts as to the amount to give to the AB, knowing members will pass along just compensation for the numerous benefits of membership.
- Affiliated Bodies using the voluntary AMRA system must execute it gracefully and with dignity. There should be no pressure nor repeated announcements about AMRA during meetings and no individuals should be approached with AMRA requests. AMRA containers should be visible but not overly so and should not be passed around.
- AMRA donation containers may be placed in an obvious location in the mundane areas during Rosicrucian meetings and member events.
- If a Dues system is in place, all Affiliated Body members and officers must pay the amount designated in the AB’s bylaws. AMORC Life Member designation does not exempt members from paying dues to their local Affiliated Body.
- If a member does not have the means to pay the AB dues, the Officers may waive their dues for up to six months.



## **Solicitation of Funds**

- If the Affiliated Body or the Regional Committee wishes to solicit funds for any purpose, written approval for both the solicitation and its wording must be obtained through the chain of command, by the Grand Lodge.
- Raffles are not permitted as they are considered gambling by the IRS.
- Affiliated Bodies or Regional Committees may solicit funds from AMORC members only once each year.
- The Master/Group Leader has the responsibility to track the number of solicitations each year to ensure they only occur once per year.
- It is never acceptable to solicit funds via the telephone.
- ABs and/or the Regional Committee may offer fundraising events which can be via donation or a set amount agreed upon by the Officers of either group.

## **Member Conduct**

The Rosicrucian Order, AMORC is non-political, non-sectarian, and a part of the western mystical spiritual tradition. The following behavior is not allowed in Affiliated Bodies and should be stopped when noticed:

1. Political and/or religious discussions
  2. Gossip or the spreading of rumor
  3. Practicing or discussing ritual magic
  4. Using ABs to expand business contacts or increase business
    - a. Selling materials to advance one's business
    - b. Handing out business cards
  5. Proselytizing for another group
- The procedure for handling inappropriate behavior is to bring it to the Master/Group Leader's attention.
    - The Master/GL refers any problems they can't resolve to the Regional Monitor.
    - The Master/GL should inform the RM and GC of any extraordinary occurrence and how it was resolved; otherwise, the RM and GC may hear of it and assume there is still an issue.
  - Entry into the Temple/Convocation Area is an entry into a higher level of consciousness, and all members should participate actively in enhancing this important aspect of Affiliated Body membership.
  - Discussions in the Temple/Convocation Area should be brief, courteous, and strictly to the point. It is the Master's responsibility to keep one member from dominating a discussion.
  - When using the Convocation Area for other than ritualistic work, the Sanctum should be dismantled. The exceptions are Lodge Temples which are used only for ritualistic work; they have been dedicated and may not be dismantled.
  - Photographs of Officers in ritualistic attire are not permitted, nor are photographs or videos during events in the Temple/Convocation area.

- Permission must be obtained from all subjects in photographs intended to be posted on any Social Media site. Written permission is strongly recommended. Photos should not include children.
- Appropriate terms must be used to address the Master/Group Leader and members.
  - During a ritual, the Master is addressed as Venerable Master, and the Group Leader is addressed as Respected Group Leader.
  - At other times, the Master/Group Leader and all members should be addressed as Frater or Soror, or they may be addressed by name.
  - The plurals of these Latin words are correctly spelled Fratres and Sorores and are pronounced in English as “Fraters and Sorors.”
- Appropriate business-like attire is required when participating in Convocations, Temple ritual work, and AB activities.
  - Attire must be clean, dignified, and not overly ostentatious, casual, or revealing.
  - Members do not wear hats while attending Convocation unless it is a cultural and/or religious requirement or is needed for health reasons.
- Rosicrucians represent a wide variety of faiths, denominations, and cultures. Ensure promotional materials for events scheduled near religious holidays do not contain religious references, images, or clip-art. For example, an AB event in December would be advertised as a Winter Holiday or Winter Solstice event.
- Smoking is never permitted in an Affiliated Body nor at any AB events or meetings.
- Alcoholic beverages may never be sold by Affiliated Bodies or Regional Committees nor served on Affiliated Body premises.
- Members may not seek or campaign for an office in the Affiliated Body.
- Members are encouraged to comment and post relevant content on their state’s Rosicrucian Community and Facebook sites.

### **Confidentiality and Privacy**

- The primary objective of privacy in the Order is to prevent non-members from entering Affiliated Body sessions and enjoying the privileges belonging to members by virtue of their rights and obligations of service. The principles of privacy are associated with all that occurs immediately preceding, during, and following every Convocation: specifically, the ritualistic features of the Convocation, including what is said and performed by the Master/Group Leader and each officer, as well as those aspects of ritual preceding and following the Convocation. This includes the terms, phrases, words, signs, symbols, etc., used in the Affiliated Body at the time of the presentation of the ritual.
- In addition, the procedures of rituals, exercises, and experiments within the monographs are private and therefore are withheld from non-Rosicrucian students. This is because the Order’s teachings are presented in a step-by-step manner so students may build a firm foundation as they proceed through the stages of their mystical journey.
- It is never appropriate to quote verbatim from the monographs nor to divulge rituals.
- Members are not allowed to record ritualistic work, lectures, speeches, or any Affiliated Body sessions in a Temple.

- Officers and all members of ABs must keep names, addresses, and email addresses of Rosicrucian members private. The information may only be used for official Affiliated Body business in accordance with prescribed rules and regulations. (See “Radius Lists”.)
- Affiliated Bodies must have permission from members before placing any calls to their homes or places of business for any reason.

### **Radius Lists**

- The Active Member Radius List contains names, addresses, and email addresses of members whose dues are current with the Grand Lodge who are within a reasonable distance of your group.
  - Radius lists are confidential and are to be used exclusively for approved Affiliated Body or Regional Committee use.
  - Use of this list is restricted to official Rosicrucian or Regional Committee purposes, such as sending bulletins about special events and approved special communications.
- AMORC radius lists are available to Affiliated Bodies and Regional Committees.
  - Only AB Officers and the newsletter/bulletin editor may access the List.
  - It is the obligation and responsibility of all who use the radius list to uphold AMORC’s pledge of confidentiality to its members.
  - All member information must be kept confidential at all times.
- Radius lists must not, at any time, be used for personal business or the solicitation of any individual member. (See “Solicitation of Funds” above if necessary.)
- Requests for Radius Lists should be routed through the Grand Councilor, who will request the list through Slack.
  - Each Region may have a different schedule for distributing their radius lists.
  - Contact your Regional Monitor for specifics.
- When new radius lists are obtained, the old ones must be destroyed. Old lists may not be kept in any paper or electronic format.

### **Newsletter**

- The appearance of the newsletter (or bulletin) is important as a public face of the group. It should be fresh and appealing.
- Each Region decides whether to use a regional newsletter that includes all Affiliated Bodies within the Region.
- The newsletter is distributed by email.
  - Make sure email addresses are not visible to the whole group by using the BCC function.
  - There must be an unsubscribe, opt-out, or remove-me-from-the-list statement at the bottom of the email explaining how to be removed.
- The email/newsletter distribution list is absolutely confidential. The Master/Group Leader should be aware of who has the list. Privacy is a legal requirement. The Master/Group Leader is legally responsible for the confidentiality of this list.

- An electronic newsletter should show it is coming from the local AB or Region, not from the Rosicrucian Order (Grand Lodge).

### **Meeting Space and Moving to a New Location**

Meetings cannot take place in members' homes or in a building affiliated with any religious organization. A space convenient for all members and suitable for mystical work must be used.

No change in quarters, or commitment to change quarters, may be made before approval is received from the Grand Lodge. If a change is required after establishing a regular location, the following approval process must be completed before the Affiliated Body may change its meeting quarters:

- a. The cost or rental fee for the proposed meeting quarters must be within the means of the Affiliated Body (the AB's income must cover expenses).
- b. Notice must be given regarding a discussion of a change in quarters at the next business meeting by letter, email and/or the Affiliated Body bulletin/newsletter.
- c. A discussion must be conducted at the Business Meeting.
  - i. Supporting members may not vote, but their opinions should be considered.
  - ii. A vote must be taken of the active Affiliated Body members in attendance.
  - iii. There must be a two-thirds affirmative vote in favor of the move before the change can be formally requested from Grand Lodge.
- d. If the change is approved by the members, the Change of Quarters Petition Request form may be obtained from the AB Online Resources Portal, completed and sent to the EGL via the RM and GC.
- e. The Grand Lodge, via the Regional Monitor and Grand Councilor, must approve the change of location before it can become effective.

Update your AB's information on the state's web page and other communication channels immediately upon receiving approval for the move. Also request an update to the "Local Groups" entry on Rosicrucian.org by posting a message to @Karen-EGL-Staff in the #tech-support-team channel in Slack.

## **SECTION 9: Affiliated Body Programs**

### **Affiliated Body Greeters**

An important way to increase membership is by making guests feel welcome – identify where coats should be placed, where the restrooms are, and other things you would want to know if visiting a new place for the first time. Greeters must be personable and able to answer questions about the Order and explain the requirements for Convocation.

- As part of hospitality, it is important for everyone to feel included.
- Appoint Greeters specifically to welcome newcomers and visiting members.
  - Newcomers' first impressions influence the image they have of Rosicrucians and their decision regarding whether to return.

- It is particularly important to promote the idea that we are all Rosicrucian students regardless of our length of affiliation.
- Consider having a “never turn anyone away” policy. For example, have volunteers scheduled who are willing to forego attending Convocation if a member arrives and is unable to show their credentials or a non-member arrives, so they are warmly greeted and can engage in constructive conversation and hospitality during the scheduled member-only event.
- For visiting members attending their first Convocation or meeting, introduce them to the Officers and members and instruct them in the proper protocol, such as how to wear the apron (tied at the waist with a looped knot on the left side), make the salutation, sign the Convocation Register, present their credentials, etc.

### **Public Opportunities**

The Rosicrucian **Memorial Ceremony**, held on the Fall Equinox, and the **Meditation for Peace**, held on the fourth Sunday of June, are open to the public; guests may be invited to participate. These ceremonies are a major opportunity to spread our Light and should be held outdoors in a publicly accessible place, preferably a park or other appropriate site. They may not be held at another time, for example in early September or on another day in June. If the Memorial Ceremony cannot be held within a few days of the Fall Equinox (preferably held on the exact day) or the Meditation for Peace cannot be held on the fourth Sunday of June, they should not be presented. All ABs are encouraged to hold these two ceremonies and list the time and place on their web page and in their publications. Advertising in electronic and local media is strongly advised. These ceremonies stand by themselves and should not be part of another Convocation. (See Ritualistic Handbook for additional details.)

**Open Meetings** are held to introduce the public to the Order and to make membership available to those who are interested, inspired by the saying “When the student is ready, the teacher will appear.” Topics may include a wide range of subjects, including mysticism, science, astronomy, archaeology, ancient Egypt, etc. Local members can best gauge what subjects would be of interest and of service to their community. Naturally, as with all Rosicrucian programs, we do not promote or advocate other groups, nor sectarian or partisan positions. In any presentation, the approach of our Order is foremost. Seekers come to our Open Meetings to learn about the Rosicrucian Order, not other groups.

- All programs must be based on Rosicrucian principles and must have as their goal the accomplishment of the Order’s mission of preserving and perpetuating the Rosicrucian teachings and contributing to the evolution of consciousness. There are many resources including ready-to-present programs in the AB Online Resources Portal in the section titled *Programs-Public*.
- In developing programs for members or the public, Affiliated Bodies are encouraged to invite member guest speakers and to also draw upon the full and rich resources of the Order including the *Forum*, *Rosicrucian Digest*, monographs, Rosicrucian books, and so on.
- The Rosicrucian monographs provide studies of the natural laws to help students learn how to apply them creatively in order to experience mastery of life. By definition, all disciplines, sciences, liberal arts, and cultural studies – all aspects of life and living – function

according to these natural laws and principles. Therefore, all of these areas are acceptable sources of program material.

- When utilizing material from the monographs, it is never appropriate to quote verbatim, or to divulge rituals. However, all principles and concepts, no matter in which Degree they are discussed, may be paraphrased for use in all member and public presentations.
- Copies of the Monographs (or the *Rosicrucian Forum*) may not be made nor passed around for discussion during open meetings.
- Exercises suggesting imagery and imaginative experiences are permissible as long as they include periods of silence during which time the student's own Inner Self may guide and direct the meditative experiences.
- The **Council of Solace Ritual** for Non-Members is open to the public and is a good way to introduce prospective members to the mystical atmosphere of a Rosicrucian ritual.

### **Mystical Weekends**

Ideally, the centerpiece of all ABs in a given geographical area is the **Monthly Mystical Weekend**. All ABs should plan their schedules to facilitate members participating in these. For information on upcoming Mystical Weekends, visit the <https://www.rosicrucian.org/events> calendar or Rosicrucian Community site (<https://rosicruciancommunity.org/>).

If there are multiple groups in close proximity, harmonize all schedules so members can attend as many activities at different ABs as they wish. The RM and GC can assist with this.

### **Discourses, Experiments, Presentations, and Messages**

- Affiliated Body Discourses for reading from the East at Convocations are posted in the AB Online Resources Portal in the section titled Special Discourses. Experiments and older discourses are available as well.
  - These discourses, experiments and all other approved lectures may be downloaded and printed for use by the Officers.
  - They are to be read exactly as written, and then filed away for safekeeping.
  - They are never distributed to members or non-members.
- To ensure a smooth delivery and engage listeners, the Master or presenter must be thoroughly familiar with the discourse or experiment.
- The Master/Group Leader should look for members who exhibit the ability to deliver discourses and afford them an opportunity to do so from time to time. This gives the meetings variety and provides various members training for a position as an officer.
- The Master/GL should strongly encourage and support qualified members in presenting original discourses.
  - These should be limited to 15 to 20 minutes in length. As a rule of thumb, one double-spaced typewritten page takes three minutes to deliver.
  - Original discourses must always be approved by the Master, then the RM. Once the RM approves or suggests changes, they send it to the GC for final approval.

- The approval process must be completed before the discourse is scheduled and publicly advertised.
- Members come to ABs to learn about AMORC teachings and practices, therefore it is important to ensure presentations focus on AMORC, not on other teachings or practices. If a presenter is an expert in another tradition, they should relate it to AMORC's teachings.

## **General Ritualistic Procedures**

### **Convocation**

- If an event must be canceled, notify the Regional Monitor, who then advises the Grand Councilor. If an emergency precludes an event, the Master/Group Leader uses their best judgment, and then makes a report to the RM.
- Use Convocation Registers to record attendance of members, visitors, and the Ritual Team prior to Convocation.
  - This allows the Grand Lodge, its field officers, and the group to have an overview of group participation in the Affiliated Body.
  - Best practice is to have a member responsible for assisting with sign-in and donning of aprons.
  - After three visits to the AB, visitors should be invited to formally join the Affiliated Body.
- All events must start promptly at the posted time.
  - Prior to the beginning of the ritual, the Guardian asks all members and guests to turn off cell phones and other devices.
- Members should be discouraged from approaching the Master/Group Leader or Secretary about matters until after Convocation unless it concerns the payment of dues for entry into the Temple.
- Consuming coffee, tea or other caffeinated beverages before Convocation (or any Ritual or Ceremony) is discouraged; this is a time of inward preparation for work and service.
- Ensure the Inner and Outer Guardians (Lodges/Chapters) or Guardian (Pronaos/Atrium) are briefed on how to deal with incorrect salutations to the East, wearing of the apron, outside disturbances, incorrect dues status documentation, and emergency procedures. Addressing protocol issues should always be done in the most courteous and discreet manner possible. It is best to wait until after a ritual to address these types of issues.
- If a member becomes ill during the Convocation, the Master/Group Leader asks the Inner Guardian or Guardian (Pronaos/Atrium) and a member (if needed) to intervene. The member is assisted out of the Temple or sanctum and supervised as needed. Depending upon the severity of the illness, the ritual is continued or is immediately concluded per the normal closing ritual.
  - If the Master becomes ill in a Pronaos, the Archivist takes over. In an Atrium, the Guardian takes over. In Lodges and Chapters, the Deputy Master (wearing an apron) or the Chaplain takes over in place of the Master and continues the ritual or concludes it per the normal closing ritual, depending upon the severity of the illness.

Other ritualistic team members may be substituted if absolutely vital for the continuation of the ritual.

- If the Colombe becomes ill, she rises, makes the Rosicrucian sign if possible, and leaves accompanied by the Colombe Advisor or another Soror. As requested by the Master, a Soror will take over the Colombe's duties.
- Except for the Guardian, when anyone exits the Temple, they do not re-enter.
- For rehearsals, if the Sanctum must be entered for setup, the Rosicrucian sign should be made. The Sanctum area must be respected at all times during rehearsals.

### **Affiliated Body Initiation /Affiliation**

- The prospective member should fill out an online Application for Affiliated Body Membership (which should be downloaded from the AB Online Resources Portal and customized for your AB). Although Atrium Groups do not conduct AB Initiations, they also may formalize AB membership by using the online application form.
- Initiation into the Affiliated Body may occur any time after the Introductory Discourse has been heard. Members may be initiated at any point in their degree studies. If the member has previously received an initiation into an Affiliated Body, the initiation is optional, based on the member's choice.
- Members may belong to and be initiated into more than one Affiliated Body. However, they must meet the membership requirements of each Affiliated Body they join to be considered active in that AB.
- Dues are structured according to the policy of the Affiliated Body. Some charge monthly or annual dues; others operate by the Law of AMRA.

### **Temple Degree Initiations**

After fifteen months of studying the monographs, members qualify to receive the First Temple Degree Initiation in a Lodge. In accordance with our ancient Tradition, Temple Degree Initiations are conferred in order, beginning with the First Temple Degree initiation in April (following the beginning of the Rosicrucian New Year in late March), continuing monthly throughout the year, and culminating in March with the Twelfth Degree Initiation, which is conferred only by the Grand Master.

The Grand Councilor sets the Temple Degree Initiation dates and chooses the Initiation Team. The schedule ensures the initiation ritual is in maximum harmony with the yearly cycle of Cosmic energies. Please consult the "Events" page on the Rosicrucian Community website (<https://rosicruciancommunity.org/>) to find the schedule of Lodge Temple Degree Initiations. It is the candidate's responsibility to register (and receive a confirmation letter) for initiations, which should be done well in advance of the date of initiation.

An accurate and legible record of all Temple Degree Initiations must be kept, preferably in a bound book.

### **Colombes**

The Colombe Handbook outlines all matters regarding duties and training of Colombes. If access to this material in the AB Online Resources Portal is needed, please contact your GC or RM.



## Other Ceremonies and Rituals

- Maintain a Register so all ceremonies and rituals can be accounted for at any given time.
- Following the **Officer Installation** ceremony, immediately send a copy of the signed Obligation and Oath of Office to the EGL in Slack; keep the original in the AB’s files.
- Ideally, the **Appellation Rite** is performed within twelve months of the birth of the child, but no later than eighteen months. Members and non-member friends/relatives of the family are invited to attend. At least one of the parents or guardians must be a member of AMORC. The ceremony is not part of a Convocation. A Certificate of Appellation is available in the Ritual Handbook in the AB Online Resources Portal.
- The **Wedding Ceremony** is for members who are both in good standing in the Order; neither active membership in a local group nor the First Temple Degree Initiation are required. The ceremony is not legally binding and must be performed within seven days of the legal ceremony. Non-member friends and relatives may attend. A Certificate of Marriage is in the Wedding Ceremony Ritual found in the AB Online Resources Portal.
- If a person was ever an active member of the Order and expresses a sincere wish to receive a **Rosicrucian Funeral**, then every effort must be made to respect that wish.
  - There are three different Funeral Rituals and a Burial/Cremation Ritual (although none may currently be used by an Atrium Group).
  - For any of these rituals, the Rosicrucian Funeral need not be the only service performed for the departed, as the family may have other traditions to observe as well. However, the Rosicrucian Funeral ritual should be distinct from other rituals and self-contained, not being changed, altered, or added to.
  - If the deceased has been cremated, the ashes can be interred under a rose tree at Rosicrucian Park. Contact the Grand Lodge for more information or to schedule.

**Table 10: Funeral and Burial/Cremation Rituals**

| <b>Ritual Name</b>         | <b>Location</b>  |
|----------------------------|--|
| Funeral Ritual Number 1    | Occurs in Temple of Lodge, Chapter or Pronaos; body of deceased is physically present            |
| Funeral Ritual Number 2    | Occurs at premises where body of deceased is located: a home, funeral parlor, church, or similar |
| Funeral Ritual Number 3    | Occurs in Temple of Lodge, Chapter or Pronaos; body of deceased is not present                   |
| Burial or Cremation Ritual | Cemetery or crematorium  |

## Destruction of Monographs

- Following the transition of a member, their monographs should be delivered to the AB. Destroy these and notify your Grand Councilor when this is done. If the monographs were kept electronically, work with your RM or GC to determine how to destroy the files.
- Please notify the Grand Lodge immediately at [membership@rosicrucian.org](mailto:membership@rosicrucian.org) upon the transition of a member so correspondence to that member can cease right away. Normally this is the duty of the AB Secretary/Archivist, but another Officer may do so for expediency, if necessary. Also, once the Grand Lodge has been notified, the Grand Master

will contact the team of members who meditate on behalf of fratres and sorores who have gone through transition. Anyone who would like to participate in these meditations is welcome to do so. Please email the Grand Master at [gmo@rosicrucian.org](mailto:gmo@rosicrucian.org).

## **SECTION 10: Technical Resources**

Following is a brief overview of technical resources. For specific user instructions regarding these resources, please see the Technical Manual linked from the #social-media-team channel in Slack.

### **Electronic Equipment**

ABs having permanent space with electronic equipment must develop a policy for the use of such equipment, which clearly states who may access the equipment and data and for what purposes.

### **Web Resources**

The EGL provides each State and/or Affiliated Body access to the following:

- A Slack channel for your state. Slack is an internet-based, real-time, business communications tool used by Officers and volunteers of the Order instead of email.
- A group for your state on the members-only Rosicrucian Community website.
- A State website with individual Affiliated Body web pages, for example: <https://sites.google.com/amorc.rosicrucian.org/california/rosicrucians-in-california>
  - Regional Committees, Affiliated bodies, and individual members are not authorized to create web pages representing the Order.
- Three (3) Events calendars
  - Rosicrucian Community site
  - Grand Lodge website
  - An AB Google Calendar, found as an App on the AB's state Google email webpage, which can be linked to the AB's website.
- A Facebook (FB) group for each state.
  - FB groups are moderated and open to non-members.
  - Only the EGL has the authority to create its own Facebook group.
- A State email account. Example: (california@amorc.rosicrucian.org)
- Downloadable resources in the AB Online Resources Portal at [amorc.customerhub.net](http://amorc.customerhub.net).

### **Leveraging Web Resources**

The EGL provides a number of resources for use by all ABs. To use these resources effectively, all Officers must have computer access and skills, and **at least one Officer must be Web savvy**. It is essential to develop the computer skills necessary to navigate the Internet. These skills can be learned at nearby Community Colleges or Universities, and there are also some good tutorials on YouTube.com.

It is recommended that all Officers:

- Join the Order's workspace on Slack at <https://rosicrucianorderamorc.slack.com/>. If needed, the RM can send an invitation to join.
- Participate in the Order's social networking site, [www.rosicruciancommunity.org](http://www.rosicruciancommunity.org)
- Join and become fans of the Order's Facebook group at: [www.facebook.com/Rosicrucian.Order.AMORC](http://www.facebook.com/Rosicrucian.Order.AMORC)

## **Web and Social Media Volunteers**

Each AB must have a Web Volunteer (WV) and a Social Media Volunteer (SMV) responsible for updating the AB's web and social media sites. These duties may be fulfilled by officers or other members.

- If agreed upon by the Administrative Officers and the volunteer, one person may be assigned both Web and Social Media duties.
- In coordination with the RM and/or GC, ABs may choose to have one or more Regional Web and/or Social Media volunteers to manage the duties for all or multiple ABs in a Region.

## **Slack**

It is crucial for all officers to have access to and regularly check the Order's Slack platform, as this is the primary communication channel between the EGL and its Regions, ABs, officers, and volunteers. Start here: <https://rosicrucianorderamorc.slack.com/>

## **Rosicrucian Community**

This is a space where ABs can share local events, and members can meet other members and stay connected: <https://rosicruciancommunity.org>. An active State group page in this community is one effective means for retaining new members.

## **Facebook**

Facebook (FB) is the main way seekers find the Order; in 2019, 86% of new members found AMORC through Facebook. It is especially important for recruiting and retaining younger members who are in the 18-44 age group.

Each state has a Facebook group. ABs should not establish separate FB pages as the widest possible audience is reached through their State's page.

The Social Media Volunteer for each AB should regularly post on their state's page; these posts can be either AB announcements or inspiring mystical content. They will also welcome new members who post on the page. Regular postings and welcome messages show an Affiliated Body is vibrant and active and will attract members to attend AB events. The Grand Councilor or Regional Monitor has authority to approve postings in their respective State's Facebook group; if they are not active, moderation will be taken over by the GL-Slack Social Media Team.

## Meetup

Meetup (meetup.com) is an online service used by groups to host events for people with similar interests. This has proven to be a successful venue for reaching interested spiritual seekers so each AB is encouraged to have a meetup.com site. Up to three (3) ABs in a Region can share a single Meetup account; coordinate this with the RM or GC.

In addition to promoting Open Meetings for the public, members of the AB can also blog on this site. A meetup.com site promoting an Open Meeting, followed by a Council of Solace Ritual (open to non-members), is a powerful way to attract new members.

## SECTION 11: Miscellaneous

### Official Logo

It is important to present one distinct, crisp, and professional image of the Rosicrucian Order in the public's eye. Everyone who sends any communications representing any part of the Order must ensure each piece (letter, flyer, brochure, ad, etc.) maintains a consistent image.

- The following is the Official Rosicrucian Logo of the English Grand Lodge. A copy may be downloaded from the AB Online Resources Portal.



- You can use any of the following names for the Order: Rosicrucian Order; Rosicrucian Order, AMORC; the Rosicrucians; or AMORC. These are the only versions of the Order's name that should be used in all printed and graphic materials. The acronym AMORC is spelled without periods between letters. You can refer to "the Order" or "our Order" in messages directed to members only.

### Letterhead/Stationery and Communication Guidelines

In consideration of our collective responsibility to reduce environmental destruction, all ABs are urged to carefully consider the use of any paper communications.

- If using paper correspondence, adhere to guidelines for all communications materials and ensure the appearance is crisp, fresh, neat, and professional.
- With official AMORC letterhead, use a 1-inch left margin and flush left block style.
- All correspondence and memos should use a professional-looking, businesslike font. The Grand Lodge typically uses Times New Roman. Use section headings to make dense copy easier to read.
- The correct complimentary close for letters to **members** is:

Sincerely and fraternally,

Your Name (first and last in upper and lower case)

Your Title (in upper and lower case)

- The correct complimentary close for letters to **non-members** is:  
Sincerely, (or another appropriate phrase)  
Your Name (first and last in upper and lower case)  
Your Public Title (in upper and lower case)

## **SECTION 12: Regional Committees and Grand Lodge Officers**

### **Regional Committees**

Regional Committees were created to help the Grand Lodge do the Great Work of spreading the Light of the Rosicrucian Order through in-depth public relations and promotional activities at the local level. They are involved in advertising and developing programs and activities for members and non-members, facilitate the formation of Discussion Groups, and may be assigned additional tasks by Grand Lodge.

Regional Committees serve as resource centers for their Affiliated Bodies, sponsor region-wide programs for members and the public, provide administrative and ritualistic training for officers, and help ensure local public relations efforts are consistent.

The primary goals of Regional Committees are to:

- Retain Rosicrucian membership within the Region
- Increase Rosicrucian membership within the Region
- Strengthen and serve Affiliated Bodies
- Serve the community and humanity
- Provide resources and training needed to accomplish these goals

The Regional Committee is chaired by the Grand Councilor, and voting members include Regional Monitors and the Master/GL (or designee) from each Affiliated Body in the Region.

- Masters/Group Leaders are expected to attend the regular meetings of the Regional Committee, or to send a delegate if necessary.
- Some Regional Committees meet monthly, while others find quarterly or biannual meetings to be sufficient. Check with your Grand Councilor.
- Most Regional Committees also welcome all members to participate in Regional Committee meetings and discussions.

In order for Regional Committees to be effective, Affiliated Bodies must actively support them. Individuals united together have changed the world. For the Order to be successful in its efforts to be of service and make our studies available to those who do not yet know of them, all members must expand their thinking. Supporting and participating in the Regional Committee is a key part of this process.

## **Grand Lodge Officers**

### **Grand Councilors**

Grand Councilors, approved by and acting on behalf of the Grand Master, are responsible for the Good of the Order in their Region. They oversee the work of the Regional Monitor and are responsible for coordinating AMORC policies and procedures in regard to Regional and Affiliated Body activities. Working closely with the Grand Master, the Grand Councilors are the highest-ranking Grand Lodge field officers in regard to policy interpretation, implementation, and problem resolution and have final decision-making authority regarding any Regional or Affiliated Body issues, including the approval of programs and officers, if necessary.

The Grand Councilor ensures all Affiliated Bodies within the Region function in harmony and in accordance with the rituals, rules, and regulations set forth by the Grand Lodge for each Affiliated Body. Their purpose is not to interfere with the administrative affairs of the Affiliated Body as long as the officers are conforming to the Constitution, Grand Lodge Bylaws, Administrative and Ritualistic Handbooks, approved Affiliated Body Bylaws, and the regulations of AMORC. If this is not the case, the Grand Councilor has full authority to step in at any moment and to make decisions regarding the Good of the Region or Affiliated Body. The Grand Councilor should have sole signatory authority on all bank accounts in case of emergency.

The Grand Councilor also ensures all activities, such as conventions, workshops, mystical weekends, public programs, and any other special activities, are approved through the proper chain of command. They ensure the traditional landmarks and accoutrements of the Order, such as the Shekinah, the Rose Cross, the Vestal Stand and the four Stations at the symbolical cardinal points of the Temple, are properly located. They also take part in Regional Conventions in their assigned Region. They implement new policies and procedures requested by the Grand Lodge.

The Grand Councilor, or any other officer whom she or he appoints, engages members through social media, regularly welcoming members and posting events on the Region's social media sites, such as in the State's Facebook group and on [www.rosicruciancommunity.org](http://www.rosicruciancommunity.org). The Grand Councilor communicates via Slack.

In coordination with the Regional Monitor, the Grand Councilor also ensures the Affiliated Body Officers comply with all deadlines and continue to follow up until the required report(s) have been submitted.

Permanent degree initiation teams, where possible, will be appointed by the Grand Councilor in areas that include a Lodge. The Grand Councilor determines how this will be done. The Grand Councilor serves as Master for all initiations except the Twelfth Temple Degree initiation. Under unusual circumstances or rare exceptions, they may temporarily appoint a Regional Monitor or former Grand Councilor to serve in his or her place. The Grand Master presides in the Twelfth Temple Degree Initiation.

## **Regional Monitors**

Regional Monitors are the Grand Lodge-appointed representatives directly responsible to the Grand Councilor. They are responsible for overseeing the quality of the Affiliated Body rituals and ceremonies, as well as reviewing the Affiliated Body Quarterly Reports, Annual Reports and other Grand Lodge filing requirements. They also work with the AB if improvements are needed.

Regional Monitors support and supervise general activities of the Affiliated Body or Bodies and serve as liaison between the Affiliated Bodies and the Grand Councilor. They are the first officer to whom the Affiliated Bodies turn for information. They may, at any time, examine the books and records of Affiliated Bodies in their Region. They also assist the Grand Councilor in implementing new policies and procedures requested by the Grand Lodge.

Unless the Grand Councilor appoints a web volunteer, it may be one of the responsibilities of the Regional Monitor to engage members through social media, regularly welcoming members and posting events on the Region's social media sites, such as in the State's Facebook group and on [www.rosicruciancommunity.org](http://www.rosicruciancommunity.org). The Regional Monitor communicates via Slack.

In coordination with the Grand Councilor, Regional Monitors also ensure the Affiliated Body Officers comply with all deadlines and continue to follow up until the required report(s) have been submitted.

## **SECTION 13: Purpose and Mission Statements**

The purpose of the Rosicrucian Order, AMORC and the Supreme Grand Lodge is fulfilled by all Grand Lodges worldwide, who achieve the charitable, educational, cultural, and scientific purposes of the Supreme Grand Lodge by advancing the world's knowledge of the history, principles, and teachings of the Order through whatever means available.

On a global basis, the Rosicrucian Order is supervised by a Supreme Council, which consists of the Grand Masters of all jurisdictions, chaired by the Imperator.

Grand Lodges are chartered by the Supreme Council. They are responsible for the day-to-day work of the Order within their jurisdictions and for carrying out the purposes of the Supreme Grand Lodge.

### **English Grand Lodge for the Americas**

**Mission Statement:** The mission of the English Grand Lodge for the Americas is to preserve and perpetuate the Rosicrucian teachings and to contribute to the evolution of consciousness.

**Purpose Statement:** The primary purpose of the English Grand Lodge is to make the teachings of the Rosicrucian Order, AMORC available in the English language to each sincere seeker in the Americas.

The EGL's mission and purpose are accomplished by providing monographs, offering instructional support from the Class Masters, Rose-Croix University International (RCUI) classes, Department of Instruction teleconferences and other programs, as well as by publishing additional study materials in the form of the *Rosicrucian Digest*, the *Rosicrucian Forum*, the *Rose+Croix Journal*, YouTube.com/RosicrucianTV, AMORC books, and the AMORC websites, etc.

The Affiliated Bodies serve as the living expressions of the Rosicrucian Order's mission at the local level by presenting inspiring Rosicrucian rituals and ceremonies, by creating a safe community for members and seekers to study and practice the Natural Laws governing the Universe, and by representing the Rosicrucian ideals in the community

The Grand Lodge has bylaws governing its operation and enlists Affiliated Bodies to assist with its purpose and responsibilities. There are two categories of such subordinate bodies: Regional Committees and Affiliated Bodies.

The Grand Lodge supports the work of its Regional Committees and Affiliated Bodies by providing clear policies and guidelines to help structure and focus their work, offering staff support in the administration of this work, and providing expertise in the development of materials and projects in response to the needs of its subordinate bodies.

## **How to Write a Mission Statement**

For Regional Committees and Affiliated Bodies, mission statements are created by the groups they represent. The following is intended to jumpstart your thinking and facilitate the development of mission statements.

### **The Purpose of Mission Statements**

The mission statement describes the core purpose or essence of the group and should make people want to learn more about the organization. It should be stated in two or three sentences that are brief, clear, easy to read, and informative. It also addresses three essential queries.

1. Why your group exists
2. Whom it serves
3. How it serves them

### **Creating Your Mission Statement**

1. Create a brainstorming session(s) from willing participants for ideas
2. Create a comprehensive first draft for review of several options
3. Select, edit, and refine options
4. Submit to RM for feedback and or approval if this officer did not participate in the brainstorming sessions. Establish priorities as to preferences.
5. RM submits to GC for additional comments or final selection.



## Examples of Mission Statements

- The American Red Cross prevents and alleviates human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors.
- Charity Water is a nonprofit organization bringing clear and safe drinking water to people in developing nations.
- Watts of Love is a global solar lighting non-profit bringing people the power to raise themselves out of the darkness of poverty.

## Things to Avoid

1. Professional jargon - terms only Rosicrucians would know.
2. Buzz words, slang, long words, formal language, tag lines.
3. Vagueness and generalities

## Regional Committee Mission Statement Sample

The [insert name] Regional Committee is a group of Rosicrucian volunteers working under the direction of their Grand Councilor to communicate and support the mission of the Rosicrucian Order, AMORC, within its Region by unleashing the full power and potential of collaborative service.

The [insert name] Regional Committee develops and utilizes the resources of the Order within the Region to increase and retain membership, strengthen and serve Affiliated Bodies, and serve the community and humanity. It facilitates the sharing of information and provides the resources and training necessary to accomplish these goals. It is guided by the strategies and policies of Grand Lodge, with special focus on the areas of marketing and promotion.

Through its activities, the [insert name] Regional Committee supports the creation and continued success of Affiliated Bodies in its Region. It furthers understanding of and appreciation for the Rosicrucian Order and its teachings. It provides members with an effective avenue of participation, personal growth, and personal empowerment through Service.

## Affiliated Body Mission Statement and Goal Samples

### Sample 1 – Affiliated Body Mission Statement

**MISSION STATEMENT:** The [insert name of Affiliated Body] serves as the living expression of the Rosicrucian Order's mission at the local level and represents Rosicrucian ideals in the community.

- We perpetuate the ancient ritualistic and initiatic traditions of the Order.
- We promote principles rather than personalities.
- We provide a safe, harmonious environment in which a deeper understanding of these ideals and principles can be explored through fraternal discussions, rituals, and initiations.
- In the spirit of harmony and service, we facilitate communication and connection from member to member and with the staff at the Grand Lodge, for the greater good of the Order, and for service to humanity and the planet.

- Through this connection with their greater spiritual family, we empower each individual to “Know Thyself.”

**Goals**

- Expand our awareness and personally grow through the esoteric meaning and experience of our rituals and initiations
- Conduct inspiring rituals
- Facilitate participation in the nearest monthly Mystical Weekend
- Enhance members’ understanding of Rosicrucian studies and support their spiritual growth
- Increase public awareness of Rosicrucian ideals and principles
- Increase membership
- Provide a haven for work and worship
- Serve the community and humanity

**Sample 2 – Affiliated Body Mission Statement**

**MISSION STATEMENT:** To assist each member in their search for the Truth and to share the Light gained here by aiding all humanity in evolving to the highest degree of earthly perfection

**Role 1** Service to group members: To assist each member in the search for truth and growth

**Goals**

1. Create an environment conducive to fellowship of like-minded souls

**Steps**

- a. Utilize the Egregore – group energy – to enhance individual growth
  - b. Provide encouragement and support to members on the path
  - c. Offer the opportunity for leadership as a tool for growth
2. Provide study and discussion of discourses on Rosicrucian topics
  3. Provide study and practice of experiments
  4. Perform rituals to help transform our consciousness and bring us into unity with all Rosicrucians
  5. Facilitate members connecting with the Egregore of the Rosicrucian Order
  6. Enhance members’ growth in generosity through the practice of the Law of AMRA
  7. Facilitate participation in Monthly Mystical Weekends

**Role 2** Service to the Community: To share the Light by aiding all humanity in evolving to the highest degree of earthly perfection.

**Goals**

1. Live the Light in our daily lives.

**Step**

- a. Regular study and meditation; living up to our principles

2. Share with interested individuals

**Steps**

- a. Be able and willing to talk about the Order
- b. Actively participate in the State's Facebook group

3. Hold open meetings focusing on Rosicrucian principles

**Steps**

- a. Choose topics of interest to a variety of people
- b. Plan and promote meetings in advance
- c. Encourage members to present topics of interest to them

4. Promote growth of our Affiliated Body

**Steps**

- a. Create a spotless, comfortable, attractive, and safe space
- b. Warmly and enthusiastically welcome visitors
- c. Focus on the Rosicrucian principles
- d. Be active on Social Media of all types (Facebook, Twitter, Meetup, etc.)
- e. Participate in community events
- f. Employ a method of being visible when engaging in community events (logo caps or t-shirts, etc.)
- g. Hold larger public events
- h. Host Rosicrucian gatherings, RCUI, conventions etc.