

CHAPTER 48.
MASONIC HOME
TRUSTEES OF MASONIC HOME AND
EMERGENCY RELIEF
Constitutional Provisions

The Board of Trustees of the Masonic Home shall be composed of ten (10) members. One (1) member shall be appointed by the Grand Master as Chairman beginning May 28, 2014. The Board shall be divided into sub-committees as shall be prescribed by the Constitution or Regulations of the Grand Lodge and such other sub-committees as shall be deemed appropriate by the Chairman of the Board. The Grand Treasurer and the Grand Secretary shall be Treasurer and Secretary, respectively, of the Board. The Grand Master shall designate one of the members of the Board to serve as Vice Chairman. (2014)

The initial implementation shall be three (3) of the nine (9) members of the Board shall be appointed by the Grand Master for a one (1) year term and one (1) member shall be appointed by the Grand Master as Chairman of the Board. Three (3) shall be appointed by the Grand Master only upon nomination of the Deputy Grand Master for a two (2) year term, and three (3) shall be appointed only upon nomination of the Senior Grand Warden for a three (3) year term. Thereafter the incoming Grand Master shall appoint, only upon nomination of the incoming Senior Grand Warden, three (3) members of the Craft for a three (3) year term. Vacancies shall be filled by appointment of the Grand Master for the remainder of the vacant term. No person shall serve as a member of the Board for more than six (6) consecutive years. (2014)

The members of the Board of Trustees shall be men of experience in the management of or men qualified in professions that acquaint them to the duties and responsibilities of managing and operating all aspects of nursing facilities for the aged, including, but not limited to, accountants, building maintenance, dieticians, doctors, food management, health insurance advisors, inventory management, legal counsel, marketing specialist, nurses, pharmacist, and men of similar training and experience.

The Board shall be divided into such sub-committees as shall be prescribed by the Constitution or Regulations of the Grand Lodge, such as Committee on Admissions and Non-Resident Relief, Long Range Planning/Facility, Masonic Home Budget, Hal W. Adams Hospital Service and Emergency Relief, Masonic Home Activities, and such other sub-committees as shall be deemed appropriate by the Chairman of the Board, which sub-committees shall report to the Board of Trustees the results of their respective investigations with their recommendations. All actions taken by the Board must be approved by a majority thereof.

It shall be the duty and responsibility of the Board of Trustees to determine and fix basic policy for operation of the Masonic Home and Relief Programs; to employ an Administrator to implement, administer, and operate the Masonic Home. No member of the Board of Trustees,

except the Chairman, shall give or attempt to give instructions or directions to the Administrator in respect to administration or operation of the Masonic Home. It shall be the duty of the Chairman to insure strict compliance with the provisions of this paragraph. (2011)

The Board of Trustees shall have the care, custody, and control of Masonic Home property, real and personal, and shall maintain and make routine repairs thereto and shall arrange for insurance coverage through the Insurance Committee and the Corporate Board. (Art. IX, Sec. 1(3)) (1992)

The Board of Trustees shall meet not less than once a month, at the Home in St. Petersburg, Florida, on a day to be fixed by the Chairman of the Board, provided the Board may hold the monthly meeting at the same location as the Annual Grand Communication for the month of said Annual Grand Communication and at such other times and places as the Grand Master or Chairman of the Board may designate. All actions taken by the Board must be approved by a majority of the membership of the Board. (Art. XII, Sec. 2) (2014)

The Grand Lodge of Florida in Annual Grand Communication shall, by Regulation, adopt such Rules and Regulations as may be found necessary or desirable for the management, operation, and supervision of the Masonic Home and Relief Funds, relating to eligibility for admission to the Home or to receive Masonic relief, and for the management of finances, and all operations and actions pertaining to the above shall be in strict accord with such Rules and Regulations. (Art. XII, Sec. 4)

All the Rules and Regulations now in effect and not inconsistent with the provisions of this Article shall remain in full force and effect until amended or repealed as herein provided for. (Art. XII, Sec. 5)

48.01 In approving requests and in extending emergency relief, the Board of Trustees shall apply and enforce the following division of expense of such relief: One-third to be borne by the Particular Lodge, and two-thirds to be borne by the Grand Lodge. *Provided*, that in extremely urgent cases only, the Board of Trustees is empowered to waive this rule. (1983)

48.02 The Board of Trustees of the Masonic Home may prescribe Rules for the operation and government of the Relief Funds of the Masonic Home under the Grand Lodge or its authority subject to review by the Grand Lodge at each Annual Grand Communication, provided said Board shall make no change, alteration, or amendment of Rules relating to eligibility for admission to the Masonic Home, and for relief, which shall be altered, changed, or amended only by Grand Lodge in Annual Grand Communication, and provided further that Grand Lodge may amend any or all Rules at any Annual Grand Communication with or without recommendation from the Board of Trustees. (1983)

APPENDIX

Masonic Home
Rules and Regulations

GENERAL RULES AND REGULATIONS
GOVERNING EMERGENCY AND
NON-RESIDENT MEMBER
RELIEF FUNDS; THE
HAL W. ADAMS HOSPITAL SERVICE FUND

AND

THE MASONIC HOME OF THE
STATE OF FLORIDA

June, 1960
With Revisions

Digest Of Masonic Law

EDICT

Acting under and by virtue of the authority vested in me as Grand Master of Masons in Florida, I do hereby proclaim and promulgate the following Edict:

The attached Rules and Regulations are and shall be the Rules and Regulations governing Emergency Relief and Non-Resident Member Relief Funds and The Hal W. Adams Hospital Service Fund and The Masonic Home of The State of Florida.

All other Rules and Regulations covering any and all of the foregoing subjects which are in conflict with any of the Rules and Regulations hereby promulgated are superseded pending action on this Edict by The Most Worshipful Grand Lodge of Free and Accepted Masons of Florida.

This Edict shall take effect on July 1, A.D. 1960.

Given under my hand and the Seal of The Grand Lodge this the 27th day of June A.L. 5960, A.D. 1960.

(Seal)

J. EDWIN LARSON
Grand Master

**GENERAL RULES AND REGULATIONS GOVERNING
EMERGENCY AND NON-RESIDENT MEMBER
RELIEF FUNDS; THE
HAL W. ADAMS HOSPITAL SERVICE FUND
AND**

**THE MASONIC HOME OF THE
STATE OF FLORIDA
JUNE, 1960
WITH REVISIONS**

NUMERICAL TITLE AND CHAPTER INDEX

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RULES AND REGULATIONS

**CHAPTER 1
AUTHORITY FOR THESE RULES AND REGULATIONS**

1.01 These regulations are adopted under the authority of the Grand Lodge and nothing herein shall be construed to be in conflict with the Constitution and Regulations thereof, which Constitution and Regulations are hereby referred to and made a part hereof, it being the intent of these Rules and Regulations to be supplementary of the Grand Lodge Constitution and Regulations.

**CHAPTER 2
DEFINITIONS**

2.01 Wherever used in these Regulations the following words shall have the following meaning unless the context shall clearly indicate a different meaning:

- HOME: The Masonic Home of Florida located at St. Petersburg, Florida.
- ADMINISTRATOR: The Administrator of the Masonic Home. (2012)
- ADMISSIONS COORDINATOR: Person at the Masonic Home in charge of handling and preparing the applications for presentation to the Admissions Committee. (2012)
- ORPHAN: The minor child of a deceased Master Mason without regard to whether or not the Mother of such minor child is living or dead.
- RELIEF FUNDS: All funds allocated to Masonic relief, including the Masonic Home Operating Fund, Emergency Relief Fund, Hal W. Adams Hospital Service Fund, and the Non-Resident Relief Fund.
- HOSPITAL FUND: The Hal W. Adams Hospital Service Fund.
- OPERATING FUND: The Masonic Home Operating Fund.

CHAIRMAN: The Chairman of the Board of Trustees of the Masonic Home.
GRAND MASTER: The Grand Master of Masons of Florida.
GRAND SECRETARY: The Grand Secretary of The Most Worshipful Grand Lodge of Free and Accepted Masons of Florida.
GRAND LODGE: The Most Worshipful Grand Lodge of Free and Accepted Masons of Florida.
RELIEF ADMINISTRATOR: The Relief Administrator of Emergency Relief Funds and the Hal W. Adams Hospital Service Fund.
GRAND TREASURER: The Grand Treasurer of The Most Worshipful Grand Lodge of Free and Accepted Masons of Florida.
RESIDENT: A person admitted to the Home.
EASTERN STAR: The Order of the Eastern Star.
CASE INVESTIGATOR: The Investigator of the financial affairs of applicants for Masonic Relief who shall be a Florida Mason and who shall be qualified either by training or experience. (2012)
In all cases the masculine gender shall be construed to include the feminine gender.

CHAPTER 3

GENERAL PURPOSES

3.01 The purpose of the Home is to provide a place of comfort and security for distressed, worthy Master Masons, their wives, mothers, widows, and ladies of the Order of the Eastern Star. (2012)

3.02 The purpose of the Non-Resident Relief Fund is to render sustaining help, aid and assistance to distressed, worthy Master Masons and their wives, widows and orphans who are eligible to receive the same.

3.03 The purpose of the Emergency Relief Fund is to assist in providing emergency help, aid and assistance to distressed, worthy Master Masons and their wives, widows, and orphans who are eligible therefor.

3.04 The purpose of the Hospital Fund is to provide medical, surgical and hospital care or assistance for distressed, worthy Master Masons, their wives, widows, and orphans.

3.05 Note: Regulation 3.05 of the Masonic Home Rules and Regulations was repealed as the Order of the Easter Star no longer sponsors admissions to the Masonic Home under the Life Care Plan. (2012 Proc. 377)

CHAPTER 4

BOARD OF TRUSTEES

4.01 The Board is vested with authority to manage, direct, supervise, and operate the Home and all Relief Funds in accordance with the Rules and Regulations of the Grand Lodge.

4.02 The Board shall organize immediately after each Annual Grand Communication, or as soon thereafter as practicable.

4.03 Five members of the Board shall constitute a quorum but no action shall be taken except upon concurring vote of five members.

4.04 The Board shall meet at least once each month at the Home, on a day affixed by the Chairman, *provided*, the Board may hold the monthly meeting at the same location as the Annual Grand Communication for the month of said Annual Grand Communication, *further provided*, that the Board may meet at other times and places designated by the Grand Master or the Chairman of the Board, with notice to all members of the Board. (2013)

4.05 The meetings of the Board shall be opened and closed with prayer.

4.06 The Board shall, at its first regular meeting or as soon thereafter as is practicable, employ an Administrator who shall hold office at the pleasure of the Board, at a salary not to exceed the amount appropriated therefore by the Grand Lodge. The Administrator shall be qualified and licensed in accordance with requirements of the Statutes of the State of Florida.

4.07 The Board shall have supervision and control of all purchases and contracts made for the operation of the Home. The Board may delegate to the Administrator authority to make such purchases as shall be deemed appropriate for usual and ordinary operations of the Home. They shall cause bills, authorized by the appropriation of the Grand Lodge, to be verified, with budget sub-account numbers designated thereon, and transmitted to the Grand Secretary for payment.

4.08 The Board shall each month certify the Non-Resident Relief Roll and return it to the Grand Secretary for payment. The roll shall contain the name, address, and the amount to be paid each member as approved by the Board.

4.09 The Board shall prepare and provide the forms to be used in making application for admission to the Home and for assistance from the Relief Funds, and shall prescribe the method of filing and processing such applications in accordance with the Rules and Regulations of the Grand Lodge.

4.10 The Board shall require every officer and employee who is responsible for funds or property of the Home, or Relief Funds, or residents' funds, to give a good and sufficient bond, in such amount as the Board may deem to be proper. All such bonds shall be in the custody of the Grand Master.

4.11 The Board shall prepare an operating budget for the operation of the Home and Relief Funds, and shall submit the same to the Chairman of the Committee on Finance and Accounts of the Grand Lodge on or before the January Board Meeting of each year. Request and report shall be sent to the Office of the Grand Secretary.

4.12 At the last meeting of the Board prior to the Annual Grand Communication of the Grand Lodge, the Chairman, the Administrator, the Relief Administrator, and the Chairmen of all Committees shall submit written reports of their activities to the Board, each report shall be included and shall become a part of the Annual Report of the Board. The Administrator's report shall include an annual inventory. The Board may require reports of such activities at any other time.

4.13 The Board shall, at the close of each fiscal year, submit to the Grand Lodge an Annual Report of the operations of the Home and Relief Funds.

4.14 The Board shall immediately report to the Committee on Grand Lodge Properties, all real and tangible property acquired for the Grand Lodge by said Board. The disposition and management of said property shall be by direction of the Committee on Grand Lodge Properties, subject to the Rules and Regulations governing said property. Intangible property shall be referred to the Corporate Board for disposition. The Administrator of the Masonic Home shall release jewelry only to the Chairman or Vice Chairman of the Properties Committee after a certified appraisal to be procured by the Administrator. (1991)

4.15 Traveling Expenses - Members of the Board of Trustees of the Masonic Home, the Senior Grand Warden, and Junior Grand Warden of Grand Lodge. Travel and subsistence expenses shall be paid as per Regulation 13.25.

4.16 The Chairman shall appoint such Sub-Committees from the Board as he shall deem necessary or expedient. (1983)

4.17 All transactions, actions, and decisions of the Board shall be subject to the approval of the Grand Master.

References

In relating to financial matters in the admission of residents, see Masonic Home Rules and Regulations 7.05.1. (2011 Proc. 375) |

CHAPTER 5

TREASURER AND SECRETARY

5.01 The Grand Secretary shall preserve as permanent records of the Grand Lodge all records of the actions and transactions of the Board, together with all papers, correspondence, and books, pertaining to the Home and the Relief Funds. The Grand Secretary shall compile the minutes of the meetings of the Board each year in the appropriate binder.

5.02 The Grand Treasurer and Grand Secretary shall perform such duties in regard to the Home and Relief Funds as shall be prescribed by Grand Lodge Constitution and these Regulations.

CHAPTER 6

ELIGIBILITY FOR ADMISSION TO THE MASONIC HOME AND NON-RESIDENT RELIEF

6.01 (a) Those eligible for admission to the Home under the Life Care Plan are distressed, worthy Master Masons, dual members, their wives, and widows, subject to the conditions, limitations and restrictions set forth in the Rules and Regulations. (2012)

(b) Those eligible for Non-Resident Relief are distressed, worthy Master Masons, their wives, widows, and orphans, subject to the conditions, limitations, and restrictions set forth in the Rules and Regulations. (2012)

(c) Admission for residency under the Private Pay Plan in the Masonic Home of Florida shall be allowed based upon a monthly fee schedule, which will be established by the Board of Trustees and will be comparable to fees charged by commercial life care establishments doing business in the State of Florida. Residents admitted under this program will not be obliged to convey any of his property interest to the Grand Lodge except for the monthly fees and entry fee deposit. (2008)

6.02 No person shall be admitted to the Home who is suffering from any communicable disease; or is of unsound mind; or who is intemperate or addicted to narcotics or alcoholic liquors; or is of such disposition that he cannot live in harmony with other residents of the Home or whose general mobility condition is not acceptable to the Board.

6.03 Qualifications of a Master Mason, his wife, widow, mother*, or ladies of the Order of the Eastern Star* to be admitted to residency in the Masonic Home: (*as to the Private Pay Plan only) (2012)

(a) The Master Mason under the Life Care Plan must have become a member or dual member of a Florida Lodge before he attained the age of seventy (70) years. (2008)

(b) The Master Mason under the Life Care Plan must have been a member or dual member in good standing in a Florida Lodge for not less than ten (10) years, the last three (3) of which must have been continuous, and in the event he became a member of a Florida Lodge by affiliation from another Grand Jurisdiction, he also must have been a bona fide resident of the State of Florida for ten (10) years after such affiliation. (2008)

(c) The ten year or 70 year age requirement may be waived under the following circumstances: (2014)

(1) Applicant was raised in a Florida Lodge and has been a member in good standing continuously to date of application and meets all other requirements, and by unanimous vote of all Board members present, and by approval of the Grand Master.

(d) The wife or widow of a Master Mason is only eligible for residency in the Home based on the Master Mason's Lodge membership.

(e) The Board of Trustees of the Masonic Home may allocate a portion of the rooms available at the Masonic Home for use by Master Masons, their wives, widows, mothers, or ladies of the Order of the Eastern Star from any Grand Jurisdiction recognized by The Grand Lodge of Florida on the Private Pay Plan. Florida Masons, their wives, widows, or mothers will have preference for admission to the Masonic Home of Florida under the Private Pay Plan. (2012)

6.04 The qualification for a Master Mason, his wife, widow or orphans to receive Non-Resident Relief shall be the same as (a), (b), (c), and (d) of Section 6.03.

6.05 Note: Regulation 6.05 of the Masonic Home Rules and Regulations was repealed as the Order of the Easter Star no longer sponsors admissions to the Masonic Home under the Life Care Plan. (2008)

6.06 All admissions to the Home or to the Non-Resident Relief roll shall be made at the discretion of the Board of Trustees and not as a matter of right.

6.07 No change, alteration, or amendment shall be made in the provisions of this Chapter except by direct action of the Grand Lodge in Annual Grand Communication.

CHAPTER 7

PROCEDURE FOR ADMISSION TO THE MASONIC HOME AND FOR NON-RESIDENT RELIEF

7.01 The form of application for admission to the Home under Life Care or Private Pay plans, for Non-Resident Relief or for Emergency Relief, or aid from the Hospital Fund shall be prepared by the Board of Trustees and presented to and adopted by the Corporate Board. (2012)

7.02 Applications to the Masonic Home under the Life Care Plan and Non-Resident Relief. (2008)

(a) Every application for admission to the Home must be initiated and sponsored by the Lodge of the person on whose membership the application is based. (2012)

(b) Every application for Non-Resident Relief must be initiated and sponsored by the Lodge of the person on whose membership the application is based. (2012)

All applications must be in writing upon prescribed forms furnished to the Lodges by the Grand Lodge Office or the Masonic Home. (2012)

(c) The completed applications from Lodges shall then be presented to the District Deputy Grand Master for his further review, and upon his approval and signature, shall then be presented to the Admissions Coordinator of the Masonic Home. (2012)

(d) All Applications for Admission to the Masonic Home shall be received by the Admissions Coordinator at least ten (10) days prior to the next regular meeting of the Board. The Admissions Coordinator shall thereupon furnish copies of non-medical portions of the Application to the Chairman of the Admissions Committee and to the Attorney of the Board of Trustees. (2012)

(e) All Applications for Non-Resident Relief shall be forwarded to the Chairman of the Admissions Committee at least ten (10) days prior to the next regular meeting of the Board. (2012)

7.03 (a) The Admissions Committee shall make such investigations as may be necessary or required, and shall present such applications to the Board of Trustees at the next meeting following completion of such investigation together with the recommendation of the Committee. Upon considering the report of the Admissions Committee, the Board of Trustees may approve or disapprove the admission of the applicant to the Home or grant such other relief as may be justified. When approved by the Board of Trustees and the Grand Master, the applicant may be admitted to the Home or placed on the Non-Resident Relief roll. (2012)

(b) The Administrator of the Home shall receive all applications under the Private Pay Plan and refer them to the appropriate Department Heads for recommendations as to acceptance or rejection regarding fraternal, financial, health, and mobility eligibility. The Administrator will refer the application with recommendation to the Chairman of the Board of Trustees for his approval with the concurrence of the Grand Master. (2008)

7.04 (a) Every applicant who is accepted for admittance to the Home under the Life Care Plan who owns any property, real, personal, or mixed, shall be required to convey all of his or her interest in such property to the Grand Lodge for the use and benefit of the Home, except that a member of a Particular Lodge may assign, give, bequeath, donate, transfer, or by any other means or device, convey up to but not to exceed thirty-three and one third percent (33 $\frac{1}{3}$ %) of his entire estate to a Particular Lodge Chartered by The Grand Lodge of Florida and/or to The Grand Lodge of Florida, and retain eligibility for residency in The Masonic Home of Florida, provided however the following provisions shall apply: (2008)

- (1) Said applicant shall be permitted to retain the use and disposition of ten percent (10%) of all of his or her liquid assets in excess of ten thousand dollars (\$10,000) for his or her personal use and disposition. Said ten percent (10%) allocation shall apply to all assets subsequently liquidated and/or after acquired.
- (2) Grand Lodge shall create and maintain separate ledger accounts reflecting the disposition of the liquid assets of the residents. The first ten thousand dollars (\$10,000) shall be credited to the Resident Members Trust Account. The balance of the residents liquid assets shall be divided and credited as follows: ninety percent (90%) to the Resident Members Trust Account, and ten percent (10%) for the use and benefit of the resident. The amount held for the use and benefit of the resident may be withdrawn by the resident at any time and from time to time and used in any manner the resident determines. The balance remaining in said account at the death of the resident shall be transferred to the Resident Member's Trust Account. Quarterly statements reflecting the balance in each of these accounts shall be provided to the respective residents. Ten percent (10%) of the resident's monthly excess income over maintenance cost shall be deposited in the resident's personal account and 90% of the excess shall be deposited in the Resident's Trust Fund. (2003)

If the property of the applicant is held in an estate by the entireties of the Board of Trustees with the approval of the Corporate Board shall require (2011):

- (1) The conveyance by the applicant and his spouse of all such property to the Grand Lodge for use and benefit of the Home, or
- (2) The conveyance by the applicant and his spouse of any part or portion of such property to the Grand Lodge for use and benefit of the Home, or
- (3) The conveyance by the applicant and his spouse of all or any part or portion of such property to the Grand Lodge for the use and benefit of the Home subject to life estate of applicant's spouse in such property or a part or portion thereof, or
- (4) The compliance by the applicant and his spouse with any combination of the above requirements.

Any conveyance of any property in which the applicant's spouse retains a life estate shall provide that said life estate shall terminate in the event such spouse shall sell, convey, assign, or transfer or attempt to sell, convey, assign, or transfer said life estate to any other person and shall further provide that Grand Lodge shall not sell or convey the property subject to said life estate until after termination of such life estate.

The provisions of this section shall apply to all current and future residents of the Home. (2012)

(b) Subject to the provisions of Section 7.04(a), every applicant shall sign an agreement to transfer, convey, and deliver any and all moneys or property to the Grand Lodge for the use and benefit of the Home which may come to him or her after admittance to the Home and shall execute and deliver such documents as may be reasonably required to facilitate such transfer, conveyance, and delivery, including but not limited to a Durable Power of Attorney. (2012)

(c) All residents of the Home shall be required to sign an agreement and comply with all Rules and Regulations now in effect or as may be hereafter adopted by the Grand Lodge. (2007)

(d) It shall be the duty of the Worshipful Master of the Lodge and the District Deputy Grand Master processing an application to advise the applicant and family of all provisions of these Rules and Regulations. (2008)

(e) All deeds, bills of sale, checks, assignments, and abstracts, title insurance policies, life insurance policies, casualty insurance policies, and all other papers and documents affecting and bearing on the right, title, and interest of the applicant in and to all property being conveyed, transferred, or assigned shall be transmitted to the Administrator immediately after such applicant has been tentatively approved by the Board for admission. The applicant may retain cash and other items being used for living expenses until admitted into the Home at which time such items and the balance of any cash shall be delivered to the Administrator upon arrival of the applicant at the Home, which are to be turned over to the Grand Secretary to be credited in accordance with Regulation 7.04(a). (2012)

(f) All real and tangible personal properties coming into the possession of the Board shall be turned over to the Grand Lodge Properties Committee for disposition. Said property shall be sold or handled for the best interest of the Grand Lodge for the use and benefit of the Masonic Home; and the proceeds thereof to be credited to the Resident Members Trust Account. (2008)

(g) Any applicant for admission to the Home or for relief funds who has deeded or disposed of property in any manner within five (5) years prior to making application shall be ineligible unless it is established that such property was disposed of for adequate consideration in order to secure funds to care for such applicant or applicant's dependent, or said property is re-conveyed to applicant and/or conveyed to Grand Lodge for the use and benefit of the Masonic Home; or said property was/is conveyed to a Particular Lodge and/or Grand Lodge and does not constitute a part greater than thirty-three and one third percent (33⅓%) of applicant's estate. (2008)

(h) Whenever title to real property is being conveyed to the Grand Lodge by the applicant, a title search and examination shall be conducted by an attorney or title company designated by or approved by the Grand Master prior to such conveyance. The cost of such title search or examination, together with the cost of any recording fees or documentary stamps advanced for the recording of the warranty deed to Grand Lodge, shall be deducted from the net proceeds of the sale of such real property. (2012)

(i) Whenever any papers and documents are to be recorded in the public records of any county or State, such recording shall not be done until the applicant has entered the Home as a resident thereof.

(j) After six months from the date of entry to the Home of a new resident, or upon a proper waiver of the six months or in the event of such new resident's demise after being admitted to the Home but before the *expiration* of said six months period, then all property conveyed to the Grand Lodge by such resident is subject to such disposition as the Grand Lodge may determine. However, if the new resident's spouse is also a resident, the remaining trust fund balance of the new resident shall be transferred in full to the surviving spouse. (2012)

If any boats, automobiles, trailers, furniture, or any other personal property of whatsoever kind or nature are involved, they should be disposed of as soon as practical and the funds be credited to the Resident Members Trust Account.

7.05 When the Board has approved the admission to the Home of an applicant under the Life Care Plan, the following shall be the procedure to further process the application:

- (1) The Admissions Coordinator shall notify the sponsoring Lodge by letter to bring the applicant and any requirements concerning assets to the Home. If the applicant is not presented within thirty (30) days from date of such correspondence, it will be necessary to file a new application unless the Board extends such time in its discretion. (2012)
- (2) When the Admissions Coordinator has completed all of the paper work and secured the information needed for the office, the application shall be transmitted along with all official papers to the Grand Secretary for permanent file. (2012)

Upon receipt of the notice of approval by the Admissions Coordinator, of an applicant for admission to the Home, the sponsoring Lodge shall provide transportation to the Home for the applicant and if required, provide attendants, in order that the applicant shall be delivered to the Home at the time designated by the Administrator. (2012)

7.05.1 The Grand Master is vested with absolute discretion in approving or disapproving the actions of the Board of Trustees of the Masonic Home as they relate to Fraternal Matters in the admission of residents. The Corporate Board is vested with the authority over the actions of the Board of Trustees of the Masonic Home as they relate to financial matters in the admission of residents. (2011)

7.06 The responsibility of the Lodge for the welfare of a resident admitted to the Home under the Life Care Plan does not cease upon such admission, but is a continuing responsibility, and the Lodge must assume full responsibility in any situation when notified thereof by the Board or Administrator. (2008)

7.07 All applicants for Non-Resident Relief approved by the Board of Trustees and the Corporate Board shall be on a month to month basis, and shall be certified to the Grand Secretary each month. The Grand Secretary shall make remittances to the applicant or to the one designated by the Board of Trustees to receive the assistance for the applicant. The Board of Trustees shall from time to time request the sponsoring Lodge and the District Deputy Grand Master to make investigation and to certify to the Board of Trustees that further assistance is needed. A Lodge having knowledge of any change in the condition of a recipient of relief funds shall immediately report the same to the Board of Trustees. (2011)

7.08 (a) Worthy applicants for Non-Resident Relief are not always indigent. It is the duty of this Board of Trustees to recover, if possible, the moneys granted for Non-Resident Relief, so that it might be available for those less fortunate.

(b) When the applicant for Non-Resident Relief owns real property or other valuable assets, the Board of Trustees shall have the authority to require of the applicant security for the repayment of the money granted.

The Board of Trustees shall exercise this authority upon Masonic principles of right and justice, and shall have full discretion as to the requirement thereof, and the method, time, etc., in the administration of same.

(c) All action by the Board of Trustees pursuant to Section 7.08 (b) shall be subject to the approval of the Corporate Board. (2011)

Rulings and Decisions

~~Grand Master is vested with absolute discretion in approving or disapproving action of Trustees of Masonic Home in regard to admission of applicants. (1967 Proc. 74, 210) (Repealed 2011)~~

The Grand Master is vested with absolute discretion in approving or disapproving actions of Trustees of the Masonic Home in regard to admission of applicants when it relates to Fraternal matters only. Only the Corporate Board of The Grand Lodge of Florida has the authority to accept or reject the recommendation of Trustees of the Masonic Home in regards to the financial matters of an applicant when dealing with his or her admission. (2011 Proc. 142)

CHAPTER 8

**VOLUNTARY AND INVOLUNTARY
DISCHARGE FROM HOME, TEMPORARY LEAVE OF
ABSENCE AND FUNERALS**

8.01 In the event a resident of the Home repeatedly violates any of the rules and regulations of the Home as may from time to time be amended, or it is found that their application was based upon false statements or the concealment of assets, said resident shall be subject to dismissal from the Home. The resident will be provided not less than thirty (30) days written notice of dismissal by the Board of Trustees of the Masonic Home, unless there has been a good faith determination that the applicant is a danger to himself, herself, or others in which event only such notice as is reasonable under the circumstances shall be provided. In the event such action is taken, the Admissions Coordinator or appropriate Department Head shall arrange for alternate facilities for the resident. (2012)

An applicant may cancel his or her application to the Masonic Home within seven (7) days after executing said application. The applicant shall not be required to move into the facility before expiration of the seven (7) day period. The application to the Masonic Home may be cancelled by the applicant after occupying the Home upon not less than thirty (30) days written notice to the Board of Trustees of the Masonic Home. (2012)

Upon cancellation of the Contract of Applicant under the Masonic Home of Florida Life Care Program by either the Board of Trustees or the applicant, the value of any property received by the Home through the time of cancellation and/or any monies received from the applicant, less the reasonable cost of services to the applicant, a four percent (4%) processing and an administrative fee of two percent (2%) per month, shall be refunded to the applicant. Such refund shall be made within 120 days after the giving of the notice of cancellation. (2012)

8.02 All applicants are admitted to the Home conditioned upon a favorable report by the Home physician. If such report shall be unfavorable, the Lodge requesting the admission of said applicant shall be notified by the Administrator of the rejection and be required to pay the expense incurred in returning the applicant to the place designated by said Lodge. (2012)

8.03 A resident may be given a leave of absence upon all of the following:

- (1) Completion of leave of absence forms as prescribed by the Board of Trustees;
- (2) Notification to the sponsoring Lodge of the details of the leave of absence shall serve to invoke the responsibility of said Lodge as set forth in Rule 7.06; (2012)
- (3) Completion by members of the family or persons whom the resident wishes to visit, of such responsibility forms as prescribed by the Board of Trustees;
- (4) Approval of the Home physician after examination and concurrence of the Administrator;
- (5) Approval by the Board of Trustees. If the leave of absence does not exceed two weeks in length and two hundred miles in distance, the Administrator may act.

in lieu of Board approval. In case of emergency leave, over the limitations allowed, if the Board of Trustees approval cannot be timely obtained, the Administrator must obtain authorization in the most expedient manner from the Chairman or the Vice Chairman of the Board of Trustees, or the Grand Master.

8.04 Funeral Procedure for Life Care Residents who do not have prepaid Funeral or Cremation Arrangements:

Life Care Residents of the Masonic Home of Florida that do not have prepaid funeral service or cremation arrangements will have the following services provided by The Masonic Home of Florida and available from Anderson McQueen Funeral Home of St. Petersburg, Florida, or such other funeral home as may subsequently be approved by the Board of Trustees. (2012)

The Masonic Home of Florida agrees to pay for the following:

- (1) A traditional funeral service or memorial service for cremation may be held at Anderson McQueen Funeral Home if desired, the Masonic Home Chapel, a church within the limits of Pinellas County, or such other funeral home as may subsequently be approved by the Board of Trustees. (2012)
- (2) Interment or internment at Memorial Park Cemetery Masonic Section in St. Petersburg, Florida (includes opening and closing of this gravesite only). (2012)
 - (a) Service Folders, Register Book (2012)
 - (b) Visitation at Anderson McQueen Funeral Home, if desired.

Any request made by the resident's family to the Funeral Home not within the scope of items listed above will be the sole responsibility of the family. The family must arrange for payment of these items with the funeral home. (2012)

Any deviation from this policy will only be allowed at the discretion of the Administrator or authorized representative of the Masonic Home of Florida. (2012)

CHAPTER 9

ADMINISTRATOR OF THE MASONIC HOME

9.01 The Administrator shall manage and supervise the operation of the Home. He shall be responsible for the care, comfort, and well-being of the residents of the Home and for all funds and property entrusted to his care. He shall attend all meetings of the Board of Trustees unless excused therefrom by the Chairman or the Grand Master.

9.02 The Administrator, under the supervision of the Board of Trustees, may employ employees at such salaries and wages as the Board may

specify, which must be within the amounts appropriated by the Grand Lodge for salaries and wages. The Administrator may discharge any employee for cause but he shall report all discharges to the Board, giving reasons therefor if requested. He shall be responsible for the employees' performance of their duties and for their conduct. The Administrator shall require from all employees such information on such forms as shall from time to time be approved by the Board or by Grand Lodge.

9.03 The Administrator shall use the revolving Payroll Account in the payment of salaries and wages for services rendered at the Masonic Home under the following conditions:

(a) The payroll account shall not be used for any purposes except the payment of salaries and wages.

(b) All payments of salaries and wages must be within the budget appropriations therefor, and must be authorized by the Board of Trustees, or their representative. Vouchers as provided by the Grand Lodge must be used in making these payments. A copy of each voucher, together with requisitions for the replenishing of the account, shall be sent to the Grand Secretary.

(c) The Administrator shall preserve copies of the vouchers and remittance letters, and records of verification as received from the Grand Secretary.

9.04 The Administrator shall have the authority to purchase such supplies, provisions and materials for usual and ordinary operations of the Home as authorized by the Board. He shall regularly submit all bills and invoices for purchases to the Board or a member thereof designated by the Board with the budget sub-account number placed thereon for their consideration and review. When such bills and invoices are approved by the Board or its authority, they shall be forwarded to the Grand Secretary who shall prepare proper vouchers for the payment of same.

9.05 The Administrator shall make a detailed monthly report of his expenditures from the "Petty Cash Fund." The Petty Cash Fund should be audited quarterly by the Grand Lodge Auditors.

9.06 The Administrator shall advise the Grand Secretary of any outside hospital care or specialist treatment furnished to each resident of the Home and a copy of said report shall be given to the Board.

9.07 The Administrator shall issue receipts, in triplicate, for all moneys, non-cash items (foods, etc.), and gifts received by him for

the use and benefit of the Home or its residents. The original shall be given to the payor, or donor; one copy shall be retained for files at the Home, and one copy shall be sent to the Grand Secretary with remittance of the funds. A report of this shall be listed in his monthly report to the Board.

9.08 The Administrator shall prepare and submit at each monthly meeting of the Board a complete written statistical report. The report shall include a list of all discharges from, and admittances to, the Home, together with a complete statement of all moneys, non-cash items, and gifts, received by the Home. He shall prepare and submit to the Board at its last regular meeting of the year an annual written report, giving a summary of the activities of the Home.

9.09 The Administrator shall, upon admittance of a new resident to the Home, make a complete inventory of all his or her property and effects in excess of Fifty Dollars (\$50.00) in value, brought into the Home by such resident. This inventory shall be signed by the said resident, acknowledging its correctness, and it shall be kept on file at the Home. Any change in property held for any resident of the Home shall be noted and signed by the resident. Upon the death of a resident of the Home, the inventory shall be submitted to the Board, a copy forwarded to the Grand Secretary and one copy filed at the Home.

9.10 The Administrator shall, upon the death of a resident of the Home, take possession of the property of such resident, make a written inventory of same and after inventory has been taken, keep all property intact and report fully to the Board at the next regular meeting of the Board of Trustees after the death of the resident for instructions.

9.11 The Administrator shall be treasurer for the resident "Savings Account" funds. These funds shall be placed in a bank in the name of "Masonic Home of Florida Guests Accounts" subject to his deposit and withdrawal. A complete record shall be kept in the Administrator's Office of each resident's savings. This account should be audited quarterly by the auditors of the Grand Lodge and at such times as the Board may request. A written report shall be furnished the Board and the Grand Secretary on or before its March meeting, showing funds on hand. Any funds remaining in this account at the death of a resident shall be forwarded to the Grand Secretary.

9.12 The Administrator shall prepare on April 1st of each year a complete inventory of all equipment, personal property, supplies, and any other items owned by the Home, and make written report to

the Board of Trustees and the Grand Secretary within ten days, for its verification and approval.

9.13 The Administrator shall perform such other duties as may be prescribed by the Board of Trustees or by the Grand Lodge.

CHAPTER 10

EMERGENCY RELIEF

10.01 Emergency Relief shall be given only to those distressed, worthy Master Masons, who are members of regular Lodges working under a Charter granted by Grand Lodge and to their distressed, worthy wives, widows, and orphans whose need is urgent and who cannot provide for themselves, are not eligible to sufficient assistance from the State Welfare Board or who cannot be otherwise provided for. (For further information on eligibility, see Chapter 6, Section 6.03, paragraphs (a), (b), (c) and (d).) Assistance from this fund shall not exceed the sum of One Thousand Dollars (\$1,000.00) total for any one case, neither shall it extend for a period longer than three months, but by unanimous vote of all Board of Trustees Members present and approval of Grand Master, the limit may be increased. (2012)

10.02 It shall be the duty of the Relief Administrator to thoroughly investigate every application received by him for emergency relief and to consider, determine, and administer the Emergency Relief Fund in accordance with these Rules and Regulations, as his best judgment may deem proper and necessary.

10.03 The Relief Administrator shall keep an accurate, full, and complete record of all his transactions, including all receipts and disbursements, and make full report thereof to the Board of Trustees in writing at each monthly meeting, together with report of all applications and correspondence; and he shall at the last meeting of the Board of Trustees submit an annual written report.

10.04 Applications for Emergency Relief shall be submitted through the Lodge where the Master Mason, upon whose membership the application is based, is in good standing. The application shall be properly filled out and every question fully answered, and be signed by the Worshipful Master and Secretary and bear the Seal of the Lodge. The complete facts in every case must be stated. The Lodge shall recommend the amount of relief needed. The application shall contain an agreement of the Lodge to contribute 33⅓% of the relief granted. If the Lodge claims exemption from the payment of 33⅓% of the requested grant, it shall furnish a statement of the

financial condition of the Lodge, the number of its members, a statement of the dues paid per member each year and furnish satisfactory explanation of its inability to contribute. Upon completion of the application, it shall be sent to the District Deputy Grand Master of the District who shall review the application and make such recommendations as he deems proper. When the application is fully completed, the District Deputy shall forward it to the Relief Administrator for action thereon. When the Relief Administrator deems it worthy and necessary, he may waive a part or all of the Lodge's contribution if they are unable to pay the same or when it would work a hardship upon the Lodge and when the Lodge is collecting reasonable dues from its members. The Lodge shall attach and enclose a check or money order for their portion of the requested grant made payable to Grand Lodge. The Relief Administrator shall forward such checks and money orders to the Grand Secretary with requisitions of payments for Emergency Relief, and the Grand Secretary shall deposit such funds in the current income account to the credit of the Emergency Relief Fund. The Relief Administrator shall, upon approving an application for grant from these funds, forward a requisition to the Grand Secretary for the payment to be made in each case and voucher shall be issued as directed. Each month the Relief Administrator shall make a requisition for payment to those continued upon the Emergency Relief roll and enclose the check or money order from the Lodge. The requisition shall contain the name and address of the person to whom the assistance is to be sent, the amount to be paid and the written approval of the Relief Administrator. Upon receipt of the requisition, the Grand Secretary shall draw the vouchers for payment of such relief and mail same to the recipients or Lodge as designated. The Grand Secretary shall attach the requisition to a copy of the vouchers and preserve them as permanent records of the Grand Lodge.

10.05 The Relief Administrator may, in cases of extreme urgency, waive the formal application provided for herein, upon a guarantee from the Lodge that it will reimburse the Emergency Relief Fund for all funds paid out at its request if, after formal application is filed, it appears that the case is not worthy.

CHAPTER 11

HAL W. ADAMS HOSPITAL SERVICE FUND

11.01 A worthy Master Mason, his wife, widow, and orphans are eligible for assistance from this fund provided:

- (a) A Master Mason must have been raised in a Florida Lodge and be in good standing at the time of making application for relief.
- (b) If he became a member of a Florida Lodge through affiliation from another Grand Jurisdiction he must have affiliated before reaching the age of sixty-six (66) years; must have been a bona fide resident of the State of Florida and a dues paying member of a Florida Lodge for at least ten (10) years and shall have been a member in good standing for at least ten (10) years immediately preceding the date of application. (1999)
- (c) The wives, widows, and orphans are eligible based on the Master Mason's eligibility.
- (d) The applicant must be sick, afflicted, or injured and in need of medical, surgical, or hospital care, and be without money, or other means to secure the needed service, or has received these services and is unable to pay for same.
- (e) Original grants from this fund are not to exceed the sum of Five Hundred (\$500.00) Dollars; provided, however, that where a greater need is apparent to the Relief Administrator, he may, with the approval of the Board, make an additional grant.
- (f) Assistance for hospitalization from these funds shall provide ward accommodations only unless the physician in charge shall file in the hospital records of the case a written order that a private room is necessary.
- (g) All applications must be filed through the Lodge and shall be processed in like manner as application for emergency relief except that no contribution shall be required from the Lodge and provided further that the Relief Administrator may in cases of extreme urgency waive the filing of formal application before the grant is made, but the Lodge must assume responsibility for such grants, if it is later found that the applicant is not eligible under these Rules and Regulations.
- (h) The Relief Administrator shall process applications as quickly as received provided they meet all requirements of eligibility. He shall make a written report to the Board at each of the monthly meetings showing all expenditures.

CHAPTER 12

FUNDS AND FINANCIAL PROCEDURE

12.01 The Home and Relief Funds shall be budgeted and expended in accordance with the provisions of the Constitution and Regulations governing budgeting, and expenditure of Grand Lodge Funds.

12.02 The Fiscal year for the operation of the Home and Relief Funds shall be from April 1st through March 31st.

12.03 At the beginning of each fiscal year, the Board may authorize the Administrator to requisition money from the Grand Lodge for a Petty Cash Fund Account; the amount of money needed to be determined by the Board and Administrator. The Administrator may send in requisition to replenish the Petty Cash Fund as needed. There shall be attached to the requisition all paid bills with budget sub-account numbers designated. This requisition shall have the approval signature of the Board or its authorized member. The Grand Master may increase or decrease the amount of budgeted money to be carried in the Petty Cash Fund.

12.04 At the beginning of each fiscal year, the Grand Secretary, with the authorization of the Corporate Board, shall provide the sum of one month's payroll for a revolving payroll account for the use of the Masonic Home in the payment of salaries and wages. This account shall be in the name of The Most Worshipful Grand Lodge of Free and Accepted Masons of Florida and operate upon the following conditions:

- (a) The Grand Lodge shall provide vouchers in triplicate and consecutively numbered for use of the Masonic Home in the payment of authorized and approved salaries and wages for authorized services rendered the Masonic Home and its residents.
- (b) The Grand Lodge shall provide for the vouchers to be signed: The Most Worshipful Grand Lodge of Free and Accepted Masons of Florida, By _____ Administrator.
(Which shall be the Administrator of the Home).
- (c) The Grand Lodge shall provide for the Depository to mail or deliver all monthly statements and paid checks to the Grand Secretary, The Masonic Building, 220 N Ocean Street, Jacksonville, Florida 32202.

- (d) The Grand Secretary shall verify the statements and certify such verification to the Administrator immediately, and file the statement and paid checks as permanent records of the Grand Lodge.
- (e) The Grand Secretary shall prepare vouchers to replenish the payroll account upon receipt of an approved requisition from the Administrator when copies of approved vouchers are attached. The Grand Secretary shall mail or deliver deposits to the depository to replenish such payroll account, and one (1) copy of the remittance letter of deposit list shall be mailed to the Administrator.
- (f) The Grand Secretary shall render to the Board of Trustees and the Administrator a monthly statement of the payroll account.
- (g) All payroll checks shall be made out in triplicate, the original going to the employee, the duplicate copy to the Grand Secretary with requisition, and the triplicate copy retained in the Office of the Administrator.
- (h) The Administrator shall make up a payroll sheet for each payroll, showing all deductions made from salaries.

12.05 All bills and accounts shall be charged against the proper budget sub-account. The Board of Trustees may request the Corporate Board to transfer funds from one budget sub-account to another budget sub-account, within the “D-The Masonic Home and Relief Fund” account, to meet anticipated expenditures. The appropriation and budget as set up and approved by the Grand Lodge, or as amended by the Corporate Board, for the operation of the Home and Relief Funds shall be binding upon the Board of Trustees and no expenditures shall be made except in accordance therewith. (2011)

12.06 The Grand Secretary shall prepare voucher checks for the disbursement of funds of Account “D-The Masonic Home and Relief Fund.”

12.07 Statements of the Masonic Home. “The Grand Secretary shall prepare as soon as practicable after the close of each month, a detailed statement of each and every Budget

Account of the Home and Relief Funds. This statement shall show the amount appropriated by the Grand Lodge and any amendments made by the Corporate Board for each account to total amount expended from each account to date, and the balance of unexpended funds in each account to date. The Grand Secretary shall mail a copy of this statement together with complete minutes of the monthly meeting of the Board of Trustees to each member of the Corporate Board, Legal Advisors to the Board, Elected Grand Lodge Officers, Past Grand Masters, the Administrator; and such other persons or organizations as may request them in writing to the Grand Secretary; and that condensed minutes be furnished to the Particular Lodges and all others on the mailing list of the Grand Lodge.”

12.08 (a) Resident Members Trust Account. Except as otherwise provided in Regulation 7.04(a), any funds received from a resident of the Home shall be deposited in the “Resident Members Trust Account” to the credit of the particular resident. Individual accounts shall be maintained for each resident having such trust funds. (1994)

The “Resident Members Trust Account” shall be charged with an initial admission fee of five hundred dollars (\$500.00) to offset the costs of admission of said resident into the Home. A resident’s trust account shall also be charged for any expense incurred by the Home in providing outside hospital or medical care for the resident.

In addition to the foregoing, a regular monthly charge shall be made against each Resident Members Trust Account in an amount determined and fixed by the Board of Trustees and approved by Grand Lodge or by the Corporate Board during the recess of Grand Lodge. (2011)

When making a charge against the individual trust accounts of residents, the Grand Secretary shall credit the same to the Current Income Account for “D-The Masonic Home and Relief Fund.”

In the event any resident of the Home is discharged from the Home, said discharged resident shall be refunded with the balance remaining in his or her trust account after deduction of the charges as hereinabove provided. Each discharged resident

shall be furnished a detailed statement of his or her trust account for the period of time in which said person was a resident of the Home.

(b) Upon the death of a resident member any funds in his or her Trust Account shall be held for a period of ninety (90) days for payment of the following:

- (1) Two hundred dollars (\$200.00) to defray funeral expense.
- (2) Reimbursement for expense of hospitalization, medical services, drugs, surgery and similar items and expenses incurred for extraordinary attention and services and not previously paid from said Trust Fund.
- (3) After expiration of said period of ninety (90) days any remaining balance shall be transferred and credited to the Masonic Home Endowment Fund.
(2012)

12.09 The Board of Trustees shall provide spending money monthly for residents of the Home in accordance with the Budget as adopted by Grand Lodge. These funds shall be disbursed to residents by the Administrator.

CHAPTER 13

CHILDREN

13.01 It is recognized that admission of children to membership in the Home under present conditions is impracticable and undesirable. The obligation to care for, educate, and provide for the welfare of the orphan children of Master Masons, however, is an obligation sacred to Masons, and in the event of application for aid for such orphan children, such aid, help, and assistance as is necessary or appropriate shall be given or arranged by the Board of Trustees with the approval of the Grand Master.