

ANNUAL REPORT
of the
GRAND SECRETARY
JAMES L. MORGAN
and
GRAND TREASURER

GARY L. BALL

The Grand Lodge of Ancient
Free and Accepted Masons
of Oregon

Fiscal Year 2024-2025

One Hundred and Seventy-Fifth
Annual Communication
June 5 & 6, 2025

Lincoln City, Oregon

Grand Secretary's Report

Most Worshipful Grand Master, Grand Lodge Officers, Past Grand Masters, Distinguished Guests, Delegates, and Brethren, it has been another busy year in the Grand Lodge office. There were several projects that arose following the 2024 Annual Communication that kept the staff busy.

In August I traveled to Louisiana with several staff members to attend the annual Grand View Users Conference. At the conference we were introduced to some of the changes that would be coming later in the year with Grand View 2.0. The mandatory upgrade to 2.0 was scheduled to roll out in October, so attending the conference gave the staff the opportunity to work through several bugs with the Grand View staff as well as users from across the country. Training like this allows our staff to be ready to assist our members, especially our Lodge Secretaries. There were lots of phone calls to the office from members about the 2.0 upgrade. With the knowledge gained at the conference and the effort of our staff, things settled down after the first couple of months. Just as we were dealing with the Grand View changes, we had an Edict from the Grand Master requiring background checks for petitioners. Again, the staff was ready to help work through this issue and soon the process was under control and Lodges were moving forward with petitioners and background checks.

This year for the first time the Grand Lodge office took over the task of sending out dues notices to the membership, relieving the Lodge Secretaries of this task. This is something that the staff had been working on with Grand View for some time and it was well received by both the Secretaries and the members. In addition to sending out the dues notices, we also began receiving online dues payments, which is proving to be popular with the members and is working well for the Lodges. Members are not required to pay online, and they can still send their cash or check to the Lodge as they always have. If a member has been Dropped for Non-Payment of Dues within the last two years, he can also make those payments online and be reinstated. In January we started taking monthly payments for dues through Grand View and currently have about 30 Brothers taking advantage of this program.

The staff has also been busy issuing new dues cards; new cards had not been issued since we originally started using the plastic cards

in 2013. The cards have an updated look based on feedback received over the years and now featuring MasonicAid information at your fingertips on the back of the card.

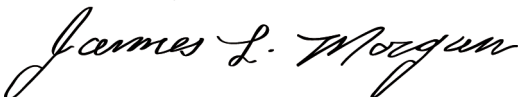
The new electronic voting system that is being launched here at our 175 Annual Communication is another example of the work done by the staff to keep Oregon Freemasonry moving forward. This change was necessitated by the failure of our previous system at last year's Annual Communication.

As you have probably seen around the venue, we have two new giving societies that the staff has been working on this year. One for members and Lodges is the 1851 Society, which will recognize and honor donors who give \$100 annually to the Masonic and Eastern Star Home funds or the Oregon Masonic Charitable Foundation. This society tracks cumulative giving and provides recognition to those members and Lodges that consistently give to our Masonic Charities. Additionally, the new Legacy Society will honor those who give through an estate or trust to our charities.

Our staff this year has had only one change, the fewest changes since I have been serving as Grand Secretary. In September, Ms. Julie Beckman left us to start a new career in nursing when she was accepted into the nursing program at OHSU. In October, Ms. Riplee Weller left her position with a medical office to join our staff as an administrative assistant, covering the front desk. Riplee worked in the office previously while attending school and we are very happy to have her working with us again.

I would like to take this opportunity to recognize the Grand Lodge Office staff. Without their commitment to our Craft many of the things that I have listed in this report would not have happened and the service we have come to expect would not be there. To the Masonic and Eastern Star Home Board and the Trustees of the Grand Lodge thank you for your support during the year. I would also like to thank the Brothers of the Grand Lodge of Oregon for the opportunity to serve you again as your Grand Secretary.

Fraternally,

A handwritten signature in cursive script that reads "James L. Morgan". The ink is dark and the signature is fluid, with a long, sweeping underline.

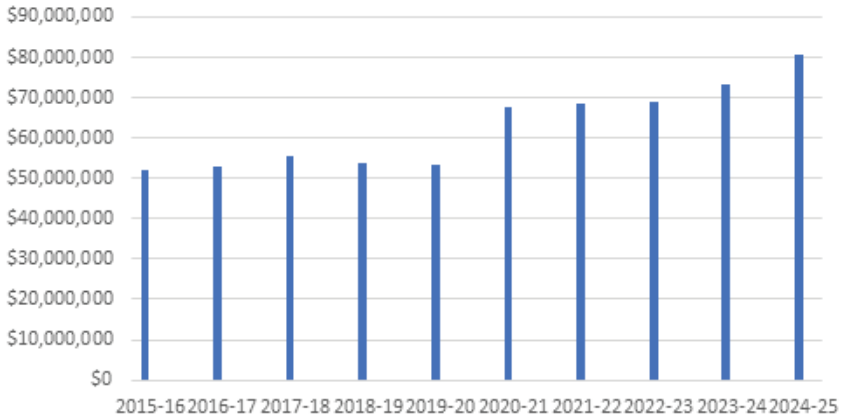
James L. Morgan P.G.M.
Grand Secretary

Grand Treasurer's Report

Most Worshipful Grand Master, Right Worshipful and Worshipful Grand Lodge Officers, Distinguished Guests, and Brethren:

It has been an honor to serve this Grand Jurisdiction of Ancient Free and Accepted Masons as your Grand Treasurer for the 2024-2025 Masonic Year. The duties of the Grand Treasurer are described in Section 111 of the Oregon Masonic Code. I have been a regular attendee at the monthly Masonic and Eastern Star Home Board and Grand Lodge Trustees meetings and have reviewed and prepared financial reports for the Board and Trustees with the assistance of Ms. Molly Todd, Masonic Grand Lodge Financial Controller. I have closely followed the ongoing activities affecting the finances of the Grand Lodge and Jennings McCall Center. I have assisted the Junior Grand Warden by reviewing the expenses of the Grand Lodge and Jennings McCall Center. I have reviewed the monthly checking account reports and bank reconciliations as recommended by our auditor. I have also been attending regular and special meetings of the Oregon Masonic Charitable Foundation this year as Treasurer of the Foundation.

The Finance Committee continued to generate sufficient revenue from invested funds to fund the Grand Lodge office and programs during this fiscal year. I have attended the monthly Finance Committee meetings where investments are reviewed and updated. Total investment income for the fiscal year was \$10.5M. The value of the Grand Lodge Investment Fund increased by 8.9 percent from its value at the end of the 2023-24 Fiscal Year despite a loss of \$1.2M during the month of April. The return on the Life Membership Fund is projected to be 7.7 percent.

End of Fiscal Year Investment Fund Value

I want to thank our Grand Lodge staff, especially the Grand Secretary and our Financial Controller, our Finance Committee chaired by W.B. Bob Keller, the Grand Lodge Trustees and the Masonic and Eastern Star Home Board for their efforts on behalf of our Fraternity.

Sincerely and Fraternally,

Gary L. Ball
Grand Treasurer



Scan this QR code to view the consolidated reports of the financials, including the Balance Sheets as of 4/30/2025 and Statement of Revenues and Expenditures from 5/1/2024 through 4/30/2025 for our Masonic and Eastern Star Home, as well as the Grand Lodge of Oregon. More detailed reports are available upon request by contacting the Grand Lodge office.

MEMBERSHIP STATISTICS**Membership Statistics**

Adjusted Membership as of 01/01/2024	5,940
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Raised	73
Affiliated	86
Reinstated	12
Prior Year Adjustments	<u>-90</u>
Gains	+81

Transferred	4
Dropped NPD	37
Demitted	19
Deaths	205
Withdrawn/Severed	14
Suspended/Expelled	<u>2</u>
Losses	-281

Net Change	<u>-200</u>
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Membership as of 12/31/2024	5,740
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