

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 2025-2026

One Hundred and Seventy-Sixth  
Annual Communication  
June 4 & 5, 2026

Salem, Oregon



## **REPORT OF THE GRAND SECRETARY**

Most Worshipful Grand Master, Grand Lodge Officers, Past Grand Masters, delegates, and Brethren all,

Change continues to be the one constant within the Grand Lodge office, and this past year was no exception. Perhaps the most visible signs of that change have been within our staff, where a period of significant transition ultimately strengthened our ability to serve the Craft.

We were pleased this year to celebrate two maternity leaves among our staff. Ms. Riplee Weller, our front-desk administrative assistant, and Ms. Courtney Chun of the MasonicAid staff both welcomed new additions to their families. During Riplee's leave, Ms. Jeni Meyer was hired and stepped seamlessly into the role. Jeni has since remained on staff after Riplee chose to return on a part-time basis. When Courtney began her leave, Ms. Victoria Howard was hired to assume a portion of Courtney's responsibilities, ensuring continuity within the MasonicAid program.

In February, Ms. Amy Barnhart, our Executive Assistant, departed the staff. Shortly thereafter, Ms. Savannah Kaufman was hired to fill that position. Savannah has brought a broad skill set, energy, and professionalism to the office and has truly hit the ground running since joining us in late March.

In March, following a statewide search, we were pleased to welcome Most Worshipful Brother Mark L. Posler as Assistant Grand Secretary. M.W.B. Posler has been working closely with me to gain a comprehensive understanding of the daily operations of the Grand Lodge office and the responsibilities of the Grand Secretary. His engagement and commitment during this transition have been encouraging and greatly appreciated.

Additionally, Ms. Kyli LaMonica transitioned from a part-time to a full-time MasonicAid case manager. While Ms. Chun is on leave, Kyli has assumed responsibility for the Subsidy Program, while continuing to manage her existing Outreach caseload. Her dedication, flexibility, and care for our members have been invaluable.

During the early part of the Grand Lodge year, a significant portion of staff time was devoted to assisting Life Members who were facing suspension for non-payment of dues in Lodges other than their Life Membership Lodge. Through diligent efforts by the staff, along with the support of the Trustees, we ensured that each of these Brothers remained active in at least one lodge. This proactive approach prevented suspension across all lodges despite Life Membership and served both the individual Brothers and the Craft as a whole.

In January, we hosted the annual Secretary's Seminar in the Jefferson Room at the Jennings McCall Continuing Care Retirement Community, a first since the pandemic. The seminar was attended by 85 Lodge Secretaries, Worshipful Masters, and other interested Brethren. The day-and-a-half program featured presentations by Grand Lodge staff addressing the programs they administer, along with practical guidance intended to make the responsibilities of Lodge Secretaries more manageable. On Friday afternoon, Jeff Clark, CEO of Grand View Systems, provided an overview of the new accounting platform. While technical issues limited the effectiveness of the presentation, lodges currently using the system reported positive experiences and confidence in its long-term value.

In February, I had the opportunity to attend the annual Conference of Grand Secretaries, held this year in Chicago, Illinois. The conference provided a valuable forum to connect with fellow Grand Secretaries, exchange ideas, and share best practices. These discussions fostered new perspectives and practical approaches that will help our Jurisdiction continue to grow and strengthen our methods of Lodge management.

Our Lodges have also been actively engaged in responding to a substantial increase in inquiries from men interested in Freemasonry. This surge is the direct result of a targeted advertising campaign launched in December by Ms. Marissa Douglas, Marketing Director. Since its inception, we have received more than 1,700 inquiries. Our District Prospect Managers, working alongside Lodge Prospect Managers, have done exceptional work responding to this interest and guiding prospective candidates through the process. This sustained level of outreach and engagement represents a strong foundation for our future growth.

In March, the Trustees approved the implementation of a new software system called Crowded, which will be used to track tax returns for all Lodges. With three lodges currently having lost their tax-exempt status, it is our hope that utilizing Crowded will help prevent this issue from occurring in the future. Once a lodge creates an account with Crowded and submits the required information, its IRS Form 990 will be tracked automatically each year and reported to the Grand Secretary's office. The system will also provide reminders to the lodge that their return has not been filed. Lodges that choose to file their own Form 990 may continue to do so; however, it will remain their responsibility to notify the Grand Lodge upon completion of the filing.

According to the Annual Returns for 2025 included in the printed report, the Grand Lodge experienced a net membership loss of 108. Included in

those losses were thirty two members dropped for Non-Payment of Dues and twenty eight withdrawals and severance. With continued attention to retention, combined with the steady influx of new prospects, I remain optimistic about positive membership growth in the coming year.

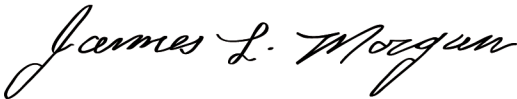
As this marks my final report as your Grand Secretary, I wish to express my sincere gratitude to several individuals and groups. First, I thank the members of the Grand Lodge of Oregon for placing their trust in me and electing me to serve in this capacity for the past four years. It has been an honor and a privilege, and it has given me a profound appreciation for Lodge Secretaries and the essential work they perform for their Lodges.

I also extend my thanks to the Trustees of the Grand Lodge and the members of the Masonic and Eastern Star Home Board. Your consistent support has made this an enormously positive experience for me, and I hope these past four years I have served the Trustees and MESH Board well.

To the staff of the Grand Lodge office—Tiffany, Marissa, Heidi, Holly, Riplee, Jeni, Molly, and Savannah—thank you. Your dedication, professionalism, and friendship made the work of this office possible each day. To Danielle, Courtney, Kyli, and Victoria, thank you for your outstanding stewardship of the Masonic Aid programs. Whenever questions arose regarding member support, I could confidently refer them to you, knowing each matter would be handled with care and competence.

Finally, and most importantly, I thank my wife, Terrie. She has graciously allowed me to devote the time and energy required to serve in this office, often at the expense of time we might otherwise have spent together. Her unwavering support has made everything I have been able to accomplish possible, and words alone cannot adequately express my gratitude.

Fraternally,

A handwritten signature in black ink that reads "James L. Morgan". The signature is written in a cursive, flowing style with a large initial "J".

James L. Morgan, P.G.M.  
Grand Secretar

## **REPORT OF THE GRAND TREASURER**

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 2025-2026 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 fiscal year 2025-26. I have attended the monthly Finance Committee meetings where investments are reviewed and updated. Total investment income for the fiscal year was \$1.34M. The value of the Grand Lodge Investment Fund increased by 19 percent from its value at the end of the 2024-25 Fiscal Year. The return on the Life Membership Fund is 12.4 percent for this year.

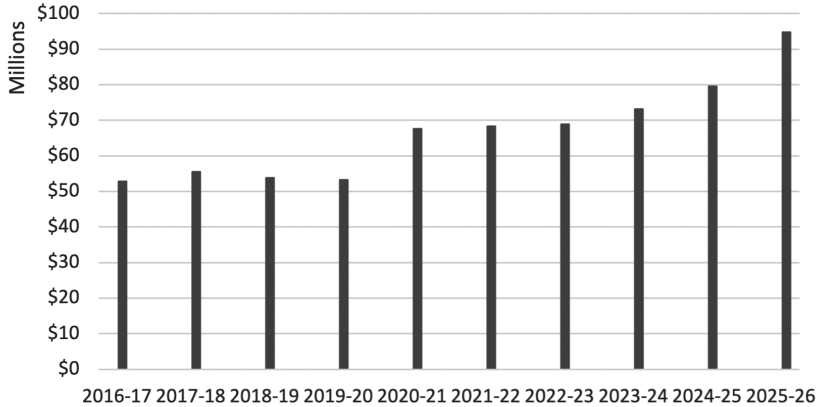
I want to thank our Grand Lodge staff, especially the Grand Secretary and our Financial Controller Ms. Molly Todd, our Finance Committee chaired by W.B. Bob Keller, the Grand Lodge Trustees and the Masonic and Eastern Star Home Board for their efforts on behalf of our Fraternity.

Sincerely and Fraternaly,



Gary L. Ball  
Grand Treasurer

### ***End of Fiscal Year Investment Fund Value***



Scan this QR code to view the consolidated reports of the financials, including the Balance Sheets as of 4/30/2026 and Statement of Revenues and Expenditures from 5/1/2025 through 4/30/2026 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 01/01/2025 5,739

Raised	74
Affiliated	111
Reinstated	15
Prior Year Adjustments	<u>-64</u>
Gains	+136

Transferred	9
Dropped NPD	32
Demitted	19
Deaths	150
Withdrawn/Severed	28
Suspended/Expelled	<u>6</u>
Losses	-244

Net Change -108

Membership as of 12/31/2025 5,631

