



THE SUPREME COUNCIL

(MOTHER COUNCIL OF THE WORLD)

ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY, SOUTHERN JURISDICTION, USA

March 26th, 2026

Dear Iowa, Scottish Rite Brothers,

To keep you informed about the Ancient and Accepted Scottish Rite of Freemasonry, Southern Jurisdiction, USA I have attached Sovereign Grand Commanders 2025 report for you to review.

Please if you have questions or comments, please reach out to me. Remember as your Deputy I am here to service you.

Fraternally yours,

Tim Felton, 33rd Degree – Deputy
Orient of Iowa



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March 19, 2026

To: Actives & Deputies


Sovereign Grand Commander 

From: Jim Cole, SGC

Subj: Department Reports

Thank you for taking more of your valuable time to review this report.

As we know, in addition to your Orient duties, members of the Supreme Council serve, in one respect, as the national board of directors for Scottish Rite in the Southern Jurisdiction. As board members, you need to know how our department heads are performing, and you need to receive their personal, unfiltered opinions as to the status of the individual departments. To assist you in this responsibility, I am regularly sharing updates, conducting Zoom meetings, and providing this annual reporting effort.

Two days ago, Department Heads submitted annual reports to me as part of the preparation of my *Allocution* process. I requested reports from each of our Department Heads in the following format:

- (1) A list of three to ten Significant Accomplishments for the Year 2025. I defined “Significant Accomplishment” as something that would headline a hypothetical department newsletter.
- (2) A one paragraph Assessment of the State of the Department.
- (3) A list of two to five Significant Planned Initiatives for the near term with explanations. The list of Significant Planned Initiatives is fewer in number than the Significant Accomplishments list because a good operation will always accomplish more than it plans.

I present to you the following reports as I received them, with no editing, except in the heading and format of each report. I would welcome any questions. I think you will agree, we are blessed to have our current staff. They serve the Rite well.

Grand Executive Director Office and House of the Temple Allocation Report for 2026

Ill. Bill Sizemore, 33°, G.C.

State of the Department Assessment:

The Grand Executive Director's (GED) Office consists of full-time Supreme Council Staff members Ms. Crystal Tolson and Grand Executive Director Bill Sizemore, 33°, GC. The GED's office has gone from five to two full-time employees over the past decade while still performing all previously required duties and responsibilities, along with new additional duties. It has been able to do this by taking advantage of technology and automated process efficiencies. This reduction in personnel has saved the Supreme Council over \$250,000 annually (2021 dollars) in salary and benefit expenses. As in previous years, the GED's office was responsible in 2025 for a number of individual, and a multitude of cross-Departmental Supreme Council Staff and Committee projects, processes, and required activities that encompass all Supreme Council endeavors. Some of the projects, processes, and required activities are summarized in the following paragraphs, while the majority are described in individual Supreme Council Departmental Allocation Reports.

The GED is also the Custodian of the House of the Temple (Temple) by Supreme Council Statutes and is responsible for the maintenance, safety and renovation of our amazing Masonic landmark. The Temple Building & Grounds Maintenance Team consists of Ms. Bridget Jarmon; Brother Ray Johnson; and Gonzalo Campero, 32°. Brother Johnson continued to work three days a week in 2025, and the Temple Building & Grounds Maintenance Team has gone from five to less than three full-time equivalent employees over the past five years, while still performing all previously required duties and responsibilities. This reduction in personnel has further saved the Supreme Council approximately \$250,000 (2021 dollars) in annual salary and benefit expenses. The reduced Temple Maintenance Staff has retained the ability to surge to meet all work requirements through the use of volunteers, other Supreme Council staff members, and, on occasion, temporary part-time employees.

Significant Accomplishments in 2025:

Supreme Council Staff: Under the direction and guidance of the Sovereign Grand Commander, the GED's Office orchestrated and led cross-departmental efforts in 2025 that optimized Supreme Council Staff performance, efficiency, and service to the Supreme Council and its Members. These efforts included:

1) Partially achieved the 2025 GED Office Allocation stated goal "to experience our best ever year for overall Membership related statistics." The Supreme Council had an average year in 2025 due to three Orients having well below average membership statistics. Had those Orients been average, or even slightly below the statistical membership average, the Supreme Council would have enjoyed one of its best years in overall Membership related statistics.

2) Partially achieved the 2025 GED Office Allocution stated goal “to experience our best ever year of Supreme Council fundraising and expanded philanthropic opportunities.” The Supreme Council experienced an average year in fundraising and expanded philanthropic opportunities.

3) Achieved the 2025 GED Office Allocution stated goal “to orchestrate and execute the best ever Biennial Session through the utilization and incorporation of past lessons learned, new and innovative technology, expanded Temple use made possible by recently added HVAC systems, and optimum employment of Supreme Council Staff and Member Volunteers.” The 2025 Biennial Session was an unqualified success and lauded by many Supreme Council and Scottish Rite Members and Guests as the best Session they had ever attended.

4) Continued high levels of Supreme Council Committee involvement and oversight of all Supreme Council Staff functions. Supreme Council Departments worked together to support coordinated Supreme Council operations, goals and directives via a number of projects and efforts. Some of these committee led staff projects and efforts included:

- Conducted three highly successful and well-attended Virtual Workshops
- Dedicated and coordinated Supreme Council Staff efforts enabled the Scottish Rite Research Society to get back on track with respect to producing all products on schedule for the first time in years
- Expanded the number of Supreme Council Scholarships, streamlined the application process, and improved Scholarship Committee support via a new and improved applicant spreadsheet for each scholarship that resulted in only required and pertinent information going to the selection committee to enable faster and better-informed scholarship selections
- Expanded video production and virtual meeting support for Grand Lodges, Orients, and Valleys
- Updated, simplified and further streamlined the Membership Dues process, 50-Year Member and ROTC / JROTC programs with the latter two processes being fully automated, tracked and implemented via Sentinel / Patriot
- Greatly expanded Master Craftsman Online College, Online Petitions and Online Social Media Engagement programs to include the Supreme Council YouTube Channel, Facebook pages, TikTok account and Podcasts
- Combined Information Services and Membership Services into one Department for better overall alignment and synergy of efforts to improve Supreme Council, Orient, Valley and Member support and engagement
- Improved Member Restoration processes to continue to optimize member experience and overall membership statistical performance
- Finalized a Jurisdiction wide Honours process and statistical review that identified outdated and unfair selection rates between Orients to enable the Supreme Council to simplify quota calculations and enable fair and consistent Honours selection rates in the future via formal changes to the Supreme Council Statutes

5) Continued efforts to further optimize Supreme Council Staff productivity, efficiency, morale, transparency, and the highest possible levels of Supreme Council, Orient, Valley and Member support and engagement.

House of the Temple (Temple): Under the direction and guidance of the Sovereign Grand Commander, the GED and Building & Grounds Maintenance Team orchestrated and completed Temple projects and initiatives in 2025 to include:

1) Enabled the Temple Renovation Project Building Permit to remain “active” throughout 2025 via work in support of the New Banquet Room Level Entrance Project.

2) Finished the New Banquet Room Level Entrance Project on time and on final budget while saving over \$2 million from the initial cost estimate. Enabled further cost savings by performing all painting in-house by the Supreme Council Building & Grounds crew vs. the manufacturer.

3) Added a new Emergency Basement Staircase in minimal time and cost after the original Emergency Basement Staircase was determined unsafe due to extensive corrosion. Saved over \$140K from the initial Renovation Team recommended plan by combining the staircase with the New Banquet Level Entrance Project. Enabled further cost savings by performing all painting in-house by the Supreme Council Building & Grounds crew vs. the manufacturer.

4) Completed a renovation of the Banquet Room Level Men’s Bathroom and a refresh of the Executive Chamber prior to the 2025 Biennial Session via minimal cost, in-house Supreme Council Building & Grounds workforce efforts saving thousands of dollars.

5) Finished a state-of-the-art Basement Archives Room that doubled Temple archival storage capacity in one climate-controlled location. Cataloged and moved all existing archival items to the new Archival Storage Room via a combined in-house Supreme Council History & Heritage Department and Building & Grounds workforce effort. This project was funded entirely by gifts from our generous members.

6) Oversaw completion of the Renovated Basement Ladies Bathroom which is a significant improvement from the previous facility.

7) Executed the Supreme Council approved plan to drastically improve the appearance of the Basement via a coordinated in-house Supreme Council History & Heritage Department and Building & Grounds workforce effort that cleaned and painted walls and added historical displays and decorations. A contractor installed a modern and attractive new floor and reinstalled ceiling tiles that were removed in 2023 to facilitate earlier Atrium and Banquet Room HVAC projects. The combined effort radically improved the appearance and utility of the basement and has enabled Member Visitors to tour and view the amazing Collections, Archives, Book Overflow Room and Reflection Chamber located there.

8) Completed the Temple Room Organ Replacement and Renovation Project prior to the 2025 Biennial Session. This project was funded entirely by gifts from our generous members.

9) Installed a new state-of-the-art Philanthropic Room Display to highlight our philanthropies that was enabled by generous support from the Light Foundation and an in-house Supreme Council Building & Grounds workforce effort that prepared the room for the display.

10) Oversaw Supreme Council approved structural repairs to cracked and corroded angle irons in the covered area of the northeast moat at minimal cost and less than half the original cost estimate. Enabled further savings in this area via an in-house Supreme Council Building & Grounds workforce effort to repair and paint the leaking concrete roof saving thousands of dollars.

11) Enabled the Supreme Council Approved Freight Elevator Modernization Project to remain on time and on budget through attention to detail and a questioning attitude in the planning stage and by using one construction superintendent to oversee this project and New Banquet Room Ladies Bathroom project simultaneously.

12) Developed the complete and formal plan for a New Banquet Room Ladies Bathroom. We are currently looking at adjustments to the plan to simplify the plumbing and save on costs.

13) Oversaw the installation of a motorized security gate in the rear parking area of the Temple.

14) Moved the large stone Capitol Cornerstone display from the north Banquet Room Hallway to the Atrium so more visitors can see the entire display in one location and gain insights into the contributions Masons made during the founding of our Great Nation.

15) Removed, dismantled and properly stored eight large wood tables that were not being used but were original to the House of the Temple to free up much needed space in the Banquet Room.

16) Added Wi-Fi and permanent sound systems in the Temple and Banquet Rooms to enhance the quality of presentations and ceremonies held there.

17) Added remote control devices to the new Electrical Panels that were installed in 2024 to further modernize and facilitate lighting controls throughout the Temple.

Backlot Development Project / New Apartment Building: Under the direction and guidance of the Sovereign Grand Commander, the GED and Chief Financial Officer (CFO) continued to work closely with the Backlot Apartment Owner and Management Team to coordinate and optimize teamwork and cooperation between organizations in 2025.

Significant Planned Initiatives for 2026:

Supreme Council Staff: Under the direction and guidance of the Sovereign Grand Commander, the GED's Office will orchestrate and lead a number of cross-departmental efforts that optimize Supreme Council Staff performance, efficiency, and service to the Supreme Council and its Members in 2026 to include:

1) Capitalize on the previous year's success and momentum to optimize member engagement, services, support and value to enjoy the best overall year in modern Membership related statistics and set the stage to replicate it year after year.

2) Capitalize on previous successes along with new and innovative tools and processes combined with a full complement of Major Donor Officers to enjoy a record-breaking year in fundraising related statistics and efforts.

3) Orchestrate and execute three world class In-Person Leadership Conferences, an inspirational and thought-provoking Fellows Conference and the best ever 225th Supreme Council Anniversary Special Session in Charleston, South Carolina through the utilization and incorporation of past lessons learned, new and innovative technology and optimum employment of the Supreme Council Staff.

4) Bring all Patent, Certificate and Honours printing in-house for the Supreme Council Staff to execute to save time, money and reduce vulnerability from the current process of utilizing a single proprietor contract printer.

5) Move all servers off site to a more secure facility with back-up power to better safeguard files, databases and member records.

6) Team with the Orient of California to orchestrate and execute a world class RiteCare Conference.

7) Support Orient and Valley efforts to celebrate the 250th Anniversary of the founding of our Great Nation via Supreme Council Staff created articles, videos, a House of the Temple American Flag program, and the updating and reprinting of *Dynamic Freedoms*.

8) Conduct extensive process reviews to standardize donor recognition programs and streamline gift processing utilizing industry best practices while adding a new Membership product that highlights annual Development Department accomplishments and metrics.

9) Continue to Explore and Adopt new ways to further optimize Staff productivity, efficiency, morale, transparency, and the highest possible levels of Supreme Council, Orient, Valley and Member engagement and support.

House of the Temple: Under the direction and guidance of the Sovereign Grand Commander, the GED will orchestrate and lead Temple projects and initiatives in 2026 to include:

- 1) Close out the Temple Renovation Project and its Building Permit and actively seek reimbursement of the unused portion of the Building Permit from the District of Columbia.
- 2) Complete the installation of motorized caterer truck and pedestrian gates in the parking area adjacent to the New Banquet Level Entrance.
- 3) Complete the Freight Elevator Modernization Project on time and on or below budget.
- 4) Complete the New Banquet Room Ladies Bathroom Project on time and on or below budget.
- 5) Look for additional ways to appropriately rent the Temple to take advantage of our unique and magnificent facility.
- 6) Develop and post a comprehensive interactive web-based Temple Virtual Tour.
- 7) Remove old carpets, polish underlying Terrazzo floors, and paint all Atrium Levels Bathrooms via an in-house Supreme Council Building & Grounds workforce effort to enhance the appearance of these facilities.
- 8) Continue to research and plan future Temple projects to include: Modernizing the Passenger Elevator; installing an updated Colonnade Bird Prevention System; repairing uneven and lifting Front Steps; adding a second Emergency Basement Staircase in the location of the original Emergency Basement Staircase; making the Gravel Parking Lot permanent; bricking the Back Parking Area via a brick naming fundraiser; repairing the Lights above the Grand Staircase; performing Exterior Stone Cleaning, repointing and full Window restorations; and repairing cracks in all Moat Retaining Walls.

Backlot Development Project / New Apartment Building: Under the direction and guidance of the Sovereign Grand Commander, the GED and CFO will continue to work closely with the Backlot Apartment Owner and Management Team to coordinate and optimize teamwork and cooperation between our organizations in 2026.

Development Office of the Supreme Council, 33°
2026 Allocution Report of the Development Office.

Bro. Phil Shortt, 32°, K.C.C.H.
Director of Development

Accomplishments

The Development Office of the Supreme Council 33° would like to share our significant accomplishments in 2025:

The Acacia Guild – Established in 2018, this program recognizes members who contribute a \$1,000 cash to support national philanthropic efforts. Brethren in this elite group provide support to RiteCare/SRCLP, Scholarships and Grants, Disaster Relief, and preserving the House of the Temple. Since the beginning the program has grown to over \$1,416,000.00 in income. This is a straightforward way to support the philanthropic efforts of both the Scottish Rite Foundation, SJ, USA, Inc. and the House of the Temple Historic Preservation Foundation, Inc at the same time.

FreeWill – Implemented in April of 2022, a program from the social good network called FreeWill has been funded by our Council. This program allows Brethren in any state to create, at no charge, a legally binding Will in all fifty states, and other documents such as an Advanced Health Care Directive, Beneficiary Designation document, a Durable Financial Power of Attorney, and a Revocable Living Trust. Brethren can also make contributions to the Scottish Rite from their IRA Required Minimum Distributions, Stocks, Donor Advised Funds, and Crypto currency. As of this date, we have passed \$87 million in newly designated bequests through this program. Approximately 42% of the money from these bequests, or more than \$36.5 million, is designated to go directly to Valley and Orient philanthropies.

Scholarships - Our Scholarship Program continues to grow since 2020. In 2025, \$56,100 was awarded for twenty-five scholarships. Awardees were selected from more than six hundred applications by the Scholarship Committee of the Supreme Council. This program is important to students seeking higher education and serves to enhance our communities.

Grants - The Grant Program awarded grants to our Appendant Bodies and Masonic Youth Groups for the third year in a row. A total of \$20,000 was awarded to one Appendant Body and 6 Masonic Youth Groups in 2025. The goal is to assist them by providing funding for worthwhile programs that could not be undertaken without financial assistance. The Grant program was created out of the belief that these groups play a key role in the future of our fraternity.

The Sphinx of Wisdom Program – This program is designed to provide financial support for our Grant Program while allowing members to honor someone worthy of recognition for as little as \$100. In 2025 it raised \$1,550.

Disaster Relief – The United States was impacted by twenty-three separate billion-dollar weather and climate disasters in 2025. Most notable were Tornado outbreaks in May and March, heat-driven drought in the Western US, and severe flooding in central Texas. \$37,695 was collected for Disaster Relief throughout the year.

Direct Mail Campaigns – Our Direct Mail Campaign continue to serve us well raising important funding for the Scottish Rite Foundation, SJ, USA, Inc. We continue to evaluate these campaigns to improve their performance. In 2025 we moved away from the “send-to-all” mentality and focused on distributing to specific groups of Donors. This allowed us to reduce expenses while maintaining the revenue from these programs.

Temple Room Pipe Organ – Work to refurbish the 40-year-old Pipe Organ in the Temple Room has been completed. Music from the current version of the Pipe Organ was used at the 2025 Biennial Session and the Organ provided live accompaniment to the Phantom of the Opera movie played in the Temple Room in August.

Archives – The new Archives Room was officially opened in August 2025 during the Biennial Session of the Supreme Council after a successful Capital Campaign provided most of the funding need to complete the work.

Upgrade in Donor Records management – in 2025 we made a significant commitment to transition from a database record keeping system to a Web-based platform. This is being accomplished with Blackbaud’s Raiser’s Edge system. It will enhance our access to records and expand our ability to track progress of Donor’s Journey.

Where we Stand going into 2026

The Development Office has achieved consistent success with its programs in 2025. We continue to promote the benefits of our programs and access to our staff who can assist our members, Valleys, and Orients in finding the best philanthropic options. We will also adapt and create programs that will serve our membership as well as the Scottish Rite as a whole.

Significant Initiatives ahead

Access to our Donor Officers – We are promoting the valuable benefit to our membership of having access to our Donor Officers. These officers can provide valuable information to prospective Donors who wish to support the charitable work of the Scottish Rite. The information can also help individual members find ways they can support our work in ways that can provide benefits while giving. This is achieved with promotion but also encouraging our D.O.s to meet with individuals to learn and guide their journey as a contributor.

FreeWill – We will continue our work of encouraging members to complete their Will or Trust, and other important legal documents through this online social good platform. It promotes the completion of this important, personal task and honors the lessons of the fifth degree.

Masonic America 250 Flag Campaign – The Americanism Committee of the Supreme Council 33° devised the idea of offering Flags flown over the House of the Temple for a donation. The concepts were considered and the Development Office was asked to run the campaign since it would be collecting charitable gifts from the orders. Those who order the flags will receive a folded flag and certificate of authenticity as well as a discount code to order a frame from Michaels Craft stores. Our goal is to raise \$62,500 in revenue through this program.

Scholarships –In 2026 we will award a total of \$57,400 from twenty-five scholarships. Sixteen of these scholarships are endowed which provide perpetual awards. Eight scholarships are annual and will end when funding runs out. The Team will be working to increase the number and quality of the Scholarships we have to offer. We would like to increase the number of Endowed scholarships by 4-8 in number and increase Annual scholarships by four or more. We currently have three additional endowed scholarships under development that should be ready for the 2027 application period. The Class of 2025 Honourmen Class Gift effort is dedicated to creating a scholarship that will begin in 2027. If the \$50,000 goal is reached, an Endowed Scholarship will be created in the name of the class.

We expect to receive more than five hundred applications which are reviewed by the Scholarship Committee for selection of awardees. The expense of a college degree has risen remarkably over the years, and this program enhances our communities by helping cover expenses that otherwise would create debt or prevent the pursuit of higher education.

Grants – We plan to continue the Grant Program awarded grants to our Appendant Bodies and Masonic Youth Groups for the fifth year in a row. The goal is to assist them by providing funding for worthwhile programs that could not be undertaken without financial assistance. The Grant program was created out of the belief that these groups play a key role in the future of our fraternity. We are hoping to grow the Sphinx of Wisdom Program which is designed to provide financial support for our Grant Program.

Planned Gifts – We want to increase the number of Planned Gifts from donors. We hope to add 4-8 Charitable Gift Annuities, in addition to other Planned giving methods. This future support of our philanthropy is critical to our success. This is completed through direct conversations, promoting the charitable work of the Scottish Rite, and education. FreeWill is a beginning for many and gets the conversation started. Others may have estate planning underway, and we can help them clarify the directions for their plans to ensure their wishes are understood and followed. We currently maintain records on many gifts already in place.

Direct Mail – These Direct Mail campaigns serve several purposes. The mailings bring awareness and reminder of the philanthropic work of the Scottish Rite. They also encourage Donors to contribute to our causes on a regular basis.

In the past we have mailed each campaign to our entire membership with a hopeful rate of return of 3%. This can be at considerable expense, especially when including a gift like a Wall Calendar. We are working to reduce this expense ratio by directing these campaigns to Donors with that specific interest. We started this in 2025 and will continue to refine it in 2026. For example:

- Our Spring mailing will be a letter to the entire Donor roster and additional membership who have not donated to our national foundations. This will hopefully attract additional Donors into our rolls.
- Our Summer mailing will be a letter and insert promoting our philanthropies to our Donor Roster and new members in 2026.
- Our 2027 Pocket Planner will be sent to those Donors identified as enjoying the use of the Pocket Planners.
- Our 2027 Wall Calendar will be sent to those Donors identified as enjoying receiving and the use of the Wall Calendar.
- Our Fall Letter will be sent to those Donors not included on either of the Calendar mailings and New Members in 2026.

Our initial effort was to identify recipients by the list of previous donors. We had a number of members wanting their Wall Calendars who had not recently contributed to that campaign, so we added them manually to our list. Moving forward we will be able to populate the list differently in a more strategic way. We will be able to create distribution lists for Donors wanting to help RiteCare, and other specific interests.

Transition to Raiser’s Edge NXT – This initiative has exciting potential to help the Scottish Rite and foster great relationships with our Donors. We will focus on several areas:

- Data Health – Cleaning up our data will help us streamline our work.
- Defining Donor Journeys – Understanding the nuances of where our Donors fit into and creating workflows to guide our interactions.
- Identifying Donor motivations – like “Journeys,” this will allow us to track interests of specific Donors.

We will look to improve our ability to research and identify prospective donors, keep our data up to date, and find better ways to utilize the data available to us. With greater ability to analyze clean data we should be better able to build relationships that are beneficial to the Scottish Rite.

As we move forward, we will look to pivot ourselves to the preferences of new generations of Donors. The business world refers to this staying Agile! For us, it is about optimizing relationships to support our causes that will enhance our communities.

Finance Department

Allocution - 2026

**Jorge Franchi, 33°
Chief Financial Officer**

The Finance Department continues to work throughout the year to improve the functions of the Supreme Council, the House of the Temple, and the Scottish Rite Foundation, but also to assist and improve the activities of the Valleys and local Foundations. Below are several accomplishments of the Finance Department in 2025:

- The CFO completed trips to three (3) Orients and conducted reviews of Valley internal control assisting them in identifying ways to improve controls with minimal, if any cost.
- We completed the move of the Supreme Council and all entities from our former bank to our new bank, Chase. This produced savings in the cost of our bank services and improved reporting.
- Following the bid process for our banking relationship that was done last year, in 2025 we conducted an analysis of our credit card merchant processors. This review resulted in savings of approximately 0.60% in cost of our merchant processing. While this may not sound like much, our projected savings in 2026 for the membership dues payments alone is \$18,000, which is split equally between the Valleys and the Supreme Council
- We have continued our efforts to improve and quicken the reconciliation process of the monthly membership dues report/payments. By working with Patriot, we were able to cut the reconciliation process down from 5-6 days to 3-4 days.
- The Finance Department was the lead hotel contact for the 2025 Session. The communication and interaction between staff and the hotel was smooth with very few issues reported.

- The Finance Department decided on expanding the products that are available at the Session Store, which produced significant positive results, almost quadrupling our 2023 sales totals.
- The Finance Department implemented a new process of securing receipts for all company issued credit cards. This process is working more smoothly with fewer instances of lost receipts.
- The store has continued to look for ways of increasing sales and has been successful. From being at the building for weekend tours to expanding our offerings and to easing the ordering process for Valleys.

The Finance Department will be working on the following initiatives in 2026:

- The CFO will continue to visit Orients and Valleys throughout the Southern Jurisdiction.
- The Supreme Council and the House of the Temple currently use an online bill pay system to process all payments. In 2026 we will research to see if it is cost effective to transition the Scottish Rite Foundation and the Scottish Rite Research Society to a similar system.
- We will continue to work on increasing sales in the store by focusing on the 225th anniversary of the Scottish Rite and the 250th anniversary of the US. New merchandise will be created and marketed.
- While the search for a new accounting software package was planned for 2025, we could not accomplish this goal. We will work this year to identify a new package and secure pricing.

ALLOCUTION 2026 – History and Heritage
Arturo de Hoyos, 33°, G.C.

1. Significant Accomplishments.

Archives Improvements

The Rex Hutchens Archives was completed, and we met our goal of transferring thousands of boxes, cabinets, and equipment, etc. We continue cataloging and placing our 18th and 19th century patents in Mylar, and our photo archives.

Archives, Library, and Museum Acquisitions

Hon. John M. Karnes, 32°, KCCH, made a substantial donation of hundreds of Masonic and other fraternal rituals to our collections. The Masonic rituals are both official and unofficial (in the form of *King Solomon, Ecce Orienti*, etc.), as well as ritual exposures. The Grand Archivist and Grand Historian added to this with a donation of rituals from his own collection. We also received several items for the museum, including some gold Masonic jewelry, an antique Masonic apron, and a sword.

Scottish Rite Research Society

Three publications have been recently completed: (1) *William L. Boyden's Chronology 1801–1859 of the Supreme Council, Southern Jurisdiction*; (2) *Lodges of Sorrow: Craft, Rose Croix, Kadosh*; (3) *Eleven Gentlemen of Charleston. 225th Anniversary Edition*. All three have introductions by the Grand Archivist and Grand Historian, with support from the Assistance Grand Historian.

Masonic Book Club

From 1970–2010 the MBC published rare and significant Masonic books, usually one a year. In 2020 their assets were acquired by the Supreme Council with Ill. Brent Morris, 33°, GC and Arturo de Hoyos, 33°, GC, as editors. Ill. Morris worked with Westphalia Press to reprint the entire series, which should be ready this year. They also produced two new volumes and a third, *Three Distinct Knocks and Jachin and Boaz*, is ready to be printed.

2. Assessment of the Department.

As noted last year, all moving forward as it should and the department continues to make steady progress. The many inquiries addressed to the Archives, Library and Museum are handled in a timely and efficient manner.

3. Significant Planned Initiatives.

Masonic Book Club

Last year Ill. Morris retired from the project, and Ill. de Hoyos took over. He has almost completed a new volume for publication in 2026 and is working on a second “catch up”

volume which will also be ready this year. His goal is to produce at least one book per year, as originally planned.

AASR Ritual

The Revised Standard Pike Ritual was distributed in 2004. In the past 22 years it's been noted that it could benefit from revision to provide clarity in the layout, instructions, and as well as adding illustrations. The Grand Archivist and Grand Historian is making a thorough review of this material, making improvements to the layout, adding clarity and occasional illustrations.

Archives/Museum on AASR YouTube

The Grand Archivist and Grand Historian, and the Assistant Grand Historian, are showcasing items from the archives in their occasional webcast "Histories and Mysteries" on YouTube's Scottish Rite channel. We plan to continue this to provide members greater insights into our collections and their importance.

Membership Services

Ill. Dean Alban, 33°

Supreme Council Allocution Report

2026

The continued vitality of the Scottish Rite will not be determined solely by the number of men we initiate, but by how faithfully we retain, restore, and engage the Brothers who have already chosen to walk this path with us. Guided by this principle, the Membership Services Department continues its work under the direction of the Supreme Council Membership Committee to strengthen the Rite through retention, restoration, engagement, education, and recruitment support.

During the past year, the integration of Information Services into Membership Services has strengthened our ability to support Valleys throughout the Southern Jurisdiction. This alignment has unified membership strategy with the technological tools necessary to serve our members more effectively and to support Valley leadership across the Jurisdiction.

Significant Accomplishments

Retention

Retention remains the highest priority of Membership Services. While natural losses due to death continue to affect our membership, focused communication with Valleys, improved engagement programs, and better use of membership data have significantly reduced suspensions for non-payment of dues and demits.

Although deaths account for roughly four percent of our membership annually, the reduction in suspensions and demits has allowed the long-standing downward trend to stabilize. This stabilization represents an important turning point and provides a solid foundation for future growth.

With the exception of three Orients, The Scottish Rite had the best year-end results in many years.

Restoration

Restoring Brothers to active membership remains one of the most meaningful responsibilities of our department. Through collaboration with Valley Secretaries and leadership, restoration programs continue to demonstrate meaningful success.

During 2025, 476 Brothers were restored to membership in the Scottish Rite. Many of these efforts also resulted in the restoration of those Brothers to their Blue Lodges, strengthening Freemasonry more broadly.

Engagement

An engaged member is far less likely to become suspended and far more likely to recommend the Scottish Rite to others. For this reason, engagement remains central to our strategy.

Multimedia outreach has become one of the most effective engagement tools in modern Freemasonry. Through YouTube, Facebook, TikTok, podcasts, and other digital platforms, the Scottish Rite, Southern Jurisdiction has become one of the most widely viewed and listened to Masonic organizations in the world.

Key Engagement Statistics:

Member Restorations: 476 Brothers restored in 2025

Master Craftsman Online College: 8,500+ active students

YouTube Channel: 900+ videos, 62,000+ subscribers, nearly 7 million views

Facebook: 93,000+ followers with strong short-form video engagement

TikTok: 24,000+ followers and more than 1.8 million views

Podcasts: 317,000 downloads during the past year

In addition to multimedia engagement, the integration of Information Services has strengthened the digital infrastructure that supports Valleys and members throughout the Jurisdiction.

Major accomplishments during the past year include the completion of the Sentinel ordering system, enabling Valley staff to request membership cards, replacement patents, and 50-Year certificates and pins through a streamlined online ordering system. An automated Supreme Council Directory of Orient and Valley contacts was also developed in cooperation with Patriot Software Solutions, allowing Valley information to be published automatically to the Scottish Rite website.

More than 800 Sentinel users also participated in online Zoom training sessions known as 'Water Cooler Sessions,' providing practical instruction and shared learning for Valley staff and officers.

Education

Education remains a defining mission of the Scottish Rite. The Master Craftsman Online College continues to serve as the premier platform for Masonic education, with more than 8,500 active students.

Sixteen courses are currently available, including the recently introduced Ivory Key course designed to help new members better understand the history, structure, and symbolism of the Scottish Rite.

In anticipation of the 250th anniversary of the United States, five Americanism courses have also been introduced exploring the relationship between Freemasonry and the founding principles of our nation.

Recruitment Support

Membership Services supports Valley recruitment efforts through programs that encourage members to share the story of the Scottish Rite in their Blue Lodges.

The Ambassador Program and quarterly VMAP Zoom meetings provide Valley leaders with opportunities to exchange ideas and share successful strategies. Our expanding online petition program also simplifies the process for interested Master Masons to petition the Scottish Rite.

State of the Department

Membership Services continues to maintain strong working relationships with Valleys throughout the Southern Jurisdiction. Through communication, training, operational support, and digital infrastructure, the department ensures Valley leadership has the tools necessary to serve their members effectively.

The integration of Information Services into Membership Services has strengthened our ability to provide technical assistance and administrative systems for the entire Jurisdiction. The Information Services team continues to provide essential support to House of the Temple staff, Orient and Valley officers, and Scottish Rite members.

Planned Initiatives

Continued focus on retention and restoration programs to reduce suspensions.
Expansion of multimedia engagement and digital communications.
Development of additional Master Craftsman Online College courses.
Strengthening partnerships with Grand Lodges through educational collaboration.
Expanded Sentinel and Valley Secretary training via Zoom.
Ongoing evaluation and modernization of House of the Temple technology systems.

Strategic Communications Report for 2026

Elizabeth McCarthy

Accomplishments—

1. The entire Strategic Communications team provided support for the 2025 Biennial Session of the Supreme Council in August, including media coverage, comprehensive photography, printed materials, souvenirs, and slideshows.
2. This past year, the department assisted the Scottish Rite Research Society (SRRS) with the production and shipping of three limited-edition books: *William L. Boyden's Chronology of the Supreme Council, Southern Jurisdiction*; *Lodges of Sorrow: Craft, Rose Croix, Kadosh*; and *Ray Baker Harris's Eleven Gentlemen of Charleston*. The latter work, released in conjunction with celebration of the 225th anniversary of the founding of the Supreme Council, includes revisions and new photography from the Strategic Communications team.
3. In support of the Supreme Council's Americanism efforts, the team has produced a wide array of content in recognition of the 250th Anniversary of U.S. independence in 2026. Some of these efforts include: print and online support for the Masonic America 250 Flag Program; creation of lapel pin to promote a new Master Craftsman online five-course education series celebrating the milestone; a January/February 2026 issue with a focus on this historic event that included *Masonic Traveler* cover article visiting historic Philadelphia.

4. The team refreshed the look of the Development Office’s popular House of the Temple Wall calendar that included 50% new photographs of the iconic headquarters building.
5. The *Scottish Rite Journal* featured more original material in the areas of 1) research, with articles on Freemasonry and *The Master Builder, The Pit and the Pendulum*, and Heinrich Heine, and 2) illustrations, which have been beneficial in enhancing the visual appeal of articles for which no suitable images are available.
6. Continuing the organization’s branding efforts, the team has drafted a Visual Identity Guide. This resource provides clear standards for the use of graphic elements, color palettes, typography, and photography, supporting a unified and professional brand presence across all Scottish Rite materials.
7. To increase the exposure of the digital-only newsletters the *Plumblin*e (quarterly publication of the Scottish Rite Research Society) and *Amicus Illuminismi* (bi-annual newsletter of the History and Heritage Department), the team produced special edition printed issues that were distributed to all Biennial Session attendees. These publications included information about attendees could connect with these periodicals online in the future.
8. The Strategic Communications team published the booklet “The Four Cardinal Virtues” by Mark Dreisonstok, 33°, which included revised and expanded content from articles originally published in the *Scottish Rite Journal*. Attendees of the 2025 Biennial Session received print copies, and a PDF version was published shortly after the Session on the Members Dashboard.

State of the Department—

During the past 12 months, the Strategic Communications department, consisting of: Elizabeth A. W. McCarthy, Director of Strategic Communications; Kia C. Boone, Principal Graphic Designer and Photographer; and Dr. Mark Dreisonstok, 33°, Managing Editor, *The Scottish Rite Journal*, has increased its efforts to produce theme-driven issues that cover different and relevant topics from multiple directions, such as the January/February 2026 issue celebrating America’s 250th anniversary and the March/April 2026 issue addressing Light symbolism in Masonry. Additionally, the team has focused its efforts on celebrating two significant milestones taking place in 2026: the 225th anniversary of the establishment of Supreme Council and the 250th anniversary of U.S. independence; producing content including articles, photography, pins, coins, certificates, and books. The team also found new ways to repurpose and enhance existing content to increase visibility of Supreme Council publications and initiatives.

Planned Initiatives—

1. Our department plans to expand *Scottish Rite Journal* coverage in the following areas: increasing the number of Masonry-related books examined in our *Book Reviews* series;

more on-location coverage of Scottish Rite events around the jurisdiction; and more exposure of Scottish Rite Research Society publications.

2. The Strategic Communications team plans to work closely with the Supreme Council Strategic Communication Committee and Membership Services to establish a vision, motto, and brand to be used across all its media platforms to increase public awareness of Scottish Rite, SJ-produced content. In conjunction with this effort, the Strategic Communications and Membership Services teams will increase its collaboration around thematic story ideas to create more unified, cross-platform content.
3. Our team will continue developing and expanding the centralized photography archive established through coverage of major events, portraits, and official ceremonies. This initiative will further organize and preserve photographic assets to support future publications, communications, and historical documentation.