Making the











a better place

ANNUAL REPORT TO MEMBERS 2007/2008



To our members

Freemasonry is a fraternity based on the belief that each person has a responsibility to help make the world a better place. Through philanthropy, personal development and community service, we make a difference in the lives of thousands of Masons, families and others in our California communities.

In this first annual report to members, we celebrate the past year's* accomplishments, charitable giving milestones, and the generous contributions of California Masons, lodges and Masonic organizations.

*July 1, 2007 – June 30, 2008

Message from the Grand Master Richard Wakefield Hopper

This report is focused on relationships, from the Executive Committee all the way through the craft to the dedicated Masons on the sidelines of our constituent lodges.

Statistics help to tell the tale of relationships. Over the past year, your Grand Lodge leadership met with 91 lodges and shared 28 events with our concordant bodies.

Your lodge leadership attendance at Wardens Retreats increased by 20 percent and at Annual Communication by 15 percent. But, of most importance have been the one-onone conversations with individual lodges and Masons. All of these occurrences produced a common result: Lodges and Masons know that Grand Lodge is "on the level" with them; that we will talk with, not just to, each other.

Our youth orders are vitally important. I attended the California and the international sessions of DeMolay, Rainbow Girls and Job's Daughters. It was a privilege to bring greetings and to remind these young men and women of their Masonic sponsorship and a membership relationship that may continue, should they seek it.

You have demonstrated a supportive relationship with Acacia Creek communities, our children in Covina, and the California Teacher of the Year and MSAP programs. John L. Cooper retired, but his greatest legacy to our craft is the relationship he developed with his successor. I was pleased to appoint Allan L. Casalou as your Grand Secretary because of his commitment to Masonry and his being, without doubt, the best qualified man for the job.

The men of your Executive Committee will bring strong leadership in the future and I acknowledge and deeply appreciate them. The emblem of giant sequoia trees growing together and supporting each other is reflective of the vast majority of our Masons and I remain convinced that, in California, Freemasonry is standing strong.

Grand Master's Project

Project TREE provided funding for the Family Resource Center to expand and improve the services offered through the Children's and Family Services program at the Masonic Home at Covina. The program's administrative offices relocated to a renovated home, a case manager position was added, and new and improved services and programs were provided to children in the program and their families, reunified families, former children's program residents and other families needing services. For the year, the Family Resource Center provided services to 244 families.

Accomplishments by and for

California Masons

- Total annual fund contributions from California Masons for one year were the highest since 1987
- Total number of California Masons who contributed increased over the previous year for the first time since 1984
- For the sixth consecutive year, the Masonic Homes of California resident and employee annual satisfaction survey results were above the national benchmark for continuing care communities
- Ground was broken for the Acacia Creek Masonic Senior Living Communities
- Total number of California educators attending the Masonic Student Assistance Program training was the greatest in the program's 14-year history
- Wardens' retreats achieved the highest attendance since 2001

- New resources were provided for California lodges and members
- Two Lodge Management Certification Program courses were offered online: Lodge Finance and Hall Association Management
- The first *Member's Guide to Masonry in California* was produced and sent to every member
- Engage and Retain: Guide to Member Retention was produced as a tool to assist lodges in meeting the challenges of retaining member involvement
- Freemason.org was redesigned to be more useful and received awards for Web site general excellence and design excellence from the Society of National Association Publishing

The Masonic Homes of California at Covina provides state-of-the-art, residentially-based services in a safe, caring, structured and nurturing environment for children who have been abused, neglected, abandoned or impoverished. Support for the children and their families continues after discharge through our Family Resource Center with parenting classes, Project Fatherhood and family therapy.

Making the world a better place

ynthia Tapia grew up with overwhelming When she was 13, the situation became Codds stacked against her. She was the unbearable: A family argument turned youngest of six children in a poor family. physical, and the police took Cynthia to an Her parents had emigrated together from emergency shelter. It was an administrator Mexico, defining her earliest memories with at the shelter who urged her to consider their abusive, volatile relationship. Eventually, Children's and Family Services at the Masonic her father left wife and children without any Homes. means of financial support.

Cynthia Tapia

for children

"For the first time, I could count on receiving breakfast, lunch and dinner.

As her mother struggled to hold down minimum-wage jobs, basic necessities like food became daily uncertainties. Cynthia's young life, as she describes it, was a fight for survival. Once an outstanding student, she turned to drugs and alcohol as a way to cope. Cynthia tells powerfully of how Children's Services led her away from the destructive path she'd started down. "For the first time in my life, I had my own bed that I didn't have to share with three other people," she says. "For the first time, I could count on receiving breakfast, lunch and dinner."

She experienced support and stability, and turned her attention back to school. She also received the opportunity to go to college.

"Coming from a poor family, college wasn't going to be an option," she says.

Knowing that she could earn financial support through the Children's Services scholarship program, she pushed herself to excel in high school, graduating a full year early and among the top of her class.

Now 19 years old, Cynthia is about to receive her associate of arts degree from Marymount College. She then plans to pursue a bachelor's degree and career in nursing. Her story is a moving example of the effect that Children's Services has on the lives of young people – its ability to lift them out of struggles, restore their hope and enable them to reach their fullest potential.

"I am not a statistic," Cynthia says. "This has been possible because of all the support I received from Masonic Homes, and my own self-determination."

Making the world a better place for senior fraternal family members

When Mildred Oberg lost her son, she felt that she'd been left all alone.

At 91 years old, Mildred's story is one that resonates with many of our older members and widows. Mildred's husband, Brother Harold Oberg, passed away in 1964. Their son, Steven, stepped in to care for household duties, helping more each year as macular degeneration deteriorated Mildred's vision. When Steven passed away this past January, she didn't know where to turn.

"I just felt after he was gone that I couldn't go on anymore," Mildred says. "I needed someone. I couldn't be here alone."

She still felt connected to the Masons from the bulletins that her husband's lodge, Golden Rule Lodge No. 479 in San Jose, had continued to send. A holiday letter to widows arrived at the time of her son's death, and she was finally prompted to call Masonic Outreach Services. She was

connected with Laura Strom, northern California MOS care manager. Now, Laura meets regularly with Mildred to provide support and companionship.

"We just seem to get along," Mildred says affectionately. "She's been very helpful in many ways, particularly where I need help the most."

" I. just felt after he was gone that I couldn't go on anymore," Mildred says." I needed someone. I couldn't be here alone."

Laura, who has a master's degree in counseling, joined MOS this past November. With years of experience in similar programs, she's been moved by the effectiveness of MOS. She credits California Masons for

providing such generous financial assistance. "I'm able to offer this range of taking care of physical needs as well as emotional and spiritual needs," she says.

Laura has been able to target the most pressing of Mildred's needs. She arranged for a small, private service in honor of Mildred's son to lend closure in the grieving process. She has urged Mildred to move into an assisted living center, so she will be surrounded by a much-needed support network – no longer isolated and vulnerable. The two spend much of their time looking into centers and comparing notes.

With grace and courage, Mildred thanks MOS for coming into her life. "I'm very fortunate that my husband was a Mason," she says. "The program and Laura have been very helpful to me. I just don't know what I would do without them." She pauses, then adds, "They've filled the void."





Masonic Outreach Services (MOS), a program of the Masonic Homes of California, provides our fraternal family access to the services and resources they need to stay healthy and safe in their homes or in retirement facilities in their home communities.

Mildred Oberg and Laura Strom, MOS care manager



Making the world a better place

Serving our California Masonic family and our communities

86	Masons, their wives and widows received vital fraternal support and services		
331	Masonic Homes of California residents		
155	Masonic Outreach Services clients		
46	children were provided a safe place to live, learn and play at Covina		
95	b hours of volunteer time was given by 203 Masonic Homes senior and child residents		
48	degrees were conferred		
,737	' Entered Apprentice		
237	Fellow Craft		
,174	Master Mason		
:12	2 members and wardens' wives participated in leadership training		
87	were served by our community programs		
000	children were issued free child IDs		
735	educators from 182 schools attended Masonic Student Assistance Program training		
452	students received scholarships		
23	35 from lodges (not all reported)		
20	99 from California Masonic Foundation		
	8 from Masonic Homes of California		

Making the world a better place

for California lodge leaders

s junior warden at Panamericana Lodge A No. 849 in Granada Hills, Mariano Llamas is an active member of a new, steadily growing lodge. Panamericana just received its charter in late 2005 as one of California's Spanish-speaking lodges. Their central mission is to reach out to men in the San Fernando Valley who've come from foreign countries. At less than three years old, the lodge is young – and this year, Mariano has stepped into his firsttime leadership position. To foster the competent, ambitious lodge he and his brothers envision, Mariano attended the Junior Wardens' Retreat in April. He came away with a plan for the years ahead.

"There was a lot of information," he says. "Teaching us how to organize, how to get more into the community. The message was very positive, very practical."

"It exposed me to different situations that I will be able to use personally in the lodge

10

You open up your mind to look at the future and try new things. That's part of the leadership program - they are waking you up, giving you ideas.

with other members," he says. Hearing lessons from more experienced brothers has shaped his approach towards member engagement and retention. "We live in a very fast-paced society, where time is very limited," he explains. Now, he makes individual phone calls to Fellow Craft Masons, urging them to attend meetings and keeping them involved in the lodge proceedings.

Mariano also emerged from the retreat with a landslide of ideas for growing his lodge. Panamericana officers are going to attend more Grand Lodge sessions. They've begun

collaborating with a local Spanish-speaking news channel to increase visibility. The lodge is looking into offering Child ID at a nearby school. In September, they'll join a nearby English-speaking lodge's festival to reach out to the Spanish-speaking community who attend.

This is another integral part of the Masonic Education and Leadership Training program: building camaraderie and connections between lodges. Mariano notes again and again the value of hearing from fellow Masons at the training.

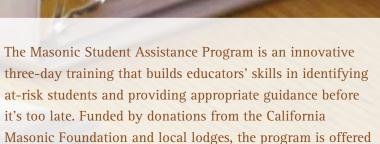
"You open up your mind to look at the future and try new things. That's part of the leadership program – they are waking you up, giving you ideas," he says. "Now we're trying to implement a lot of those ideas."



Ongoing education and training is an integral part of leadership development. The Grand Lodge of California maintains several ongoing training programs for members who are in the more than 4,000 leadership positions at the lodge, district and Grand Lodge levels.

all iles

HELP is Down the Hall A Handbook on Student Assistance



to California's public schools at no cost.

Julion Color States

Making the world a better place for California public schools

C ince 1994, the Masonic Student Assistance Program (MSAP) has equipped California public schools educators with the skills to recognize warning signs and design intervention techniques to rescue troubled students. Nearly 6,000 California educators and other faculty have learned how to build student assistance teams that provide a support network for teachers and at-risk students, at no charge.

Determined to offer MSAP training as a service to communities in the far north part of the state, Vesper Lodge No. 84 in Red Bluff raised \$25,000 to sponsor the three-day workshop this past January. Then-Master Andrew Rieland had heard about MSAP at the Junior Wardens' Retreat and was inspired by its mission. He decided to make it a focus during his year as master.

" I think we provided an excellent community service - and did so as an outstanding representation of Masonic principles."

Vesper Lodge's brothers and families reache out to surrounding schools, developing contacts in even the most remote school districts on the northern California border. "They sent letters and personally talked to different educators here in the area," Andrew says.

The schools were eager for the opportunity to connect. Eighty faculty members representing 24 schools attended the snowswept January training in Red Bluff.

Those 80 educators returned to their schools with a reassuring sense of the support available to them. They're better attuned to struggling students and more cognizant of learning barriers that must be addressed in order for some students to survive and even thrive. All around, Andrew says, the reviews were outstanding.

"A lot of work, but well worth the effort," he affirms. "There's a lot of grateful people for that."

The training will have far-reaching effects on students and educators. It's also increased community awareness about Vesper Lodge.

"We've seen nothing but good come from putting it on," Andrew says. "I think we provided an excellent community service and did so as an outstanding representation of Masonic principles."

Grand Treasurer's report

Glenn D. Woody

Through the great generosity of members and other donors over the years and the extremely efficient administration of resources by the Grand Lodge of California, our fraternity is in a sound financial position and growing. The Masonic Homes of California recently received a AA credit rating by both Standard & Poors and Fitch – one of the highest such ratings given a Masonic entity in the country.

The Grand Lodge of California consists of seven separate legal entities, each governed by a separate board of trustees. For the dual benefit of cost savings and efficiency, the Grand Lodge provides centralized business and support services to our related entities. These services, under the leadership of the Grand Secretary, include administration, finance, information technology, human resources, philanthropy and communication. In addition, committees staffed by volunteer members, each with specialized experience and skill sets, provide oversight in the areas of investments, insurance, auditing, retirement plans and finance.

To ensure that we continually provide high quality care and a living experience consistent with our principles at the Masonic Homes, a resident satisfaction survey is conducted annually by an outside firm. For the sixth consecutive year, survey results were above the national benchmark for continuing care communities. The business operation at the Grand Lodge office is extremely well organized, planned and administered. Forward-looking plans and budgets are set by each entity well in advance and closely monitored by their respective boards. The result is a "tight ship" that focuses on the financial performance of each entity compared to the budget. This degree of close monitoring often results in a better-than-budget performance.

All of this tight budgeting and performance monitoring is performed with an overarching goal to be among the best in the nation in delivering services to our constituents.









Making the world a better place

Your contributions

\$ 5,926,000	was generously contributed by 7,097 California Masons
\$1,475,000	to the Annual Fund to support Masonic Outreach Services and Masonic Education and Leadership Training
\$4,063,000	to Planned Giving
\$388,000	to the California Masonic Memorial Temple endomosaic mural restoration campaign

16

Making the world a better place

Expended in support of Masonic values

\$ 1,779,000	for education and Masonic leader development
\$ 1,252,000	for scholarships and youth group leadership grants
\$ 314,000	lodge scholarships (not all reported)
\$ 838,000	California Masonic Foundation scholarships
\$ 92,000	Masonic Homes of California scholarships
\$ 8,000	California Masonic Foundation leadership grants to Masonic youth groups
\$ 189,000	for Masonic education and leadership development
\$ 338,000	in support of public education
\$ 316,000	for Masonic Student Assistance Program training workshops
\$ 17,000	gifts at Cornerstone events at schools or education centers
\$ 5,000	California Teacher of the Year awards
\$36,339,000	for fraternal support and care
\$ 29,896,000	to operate Masonic Homes of California (Union City and Covina combined)
\$ 3,107,000	to provide Masonic Outreach Services
\$ 3,336,000	for Children's Services residents

Grand Secretary's **report** Allan L. Casalou

This continues to be an exciting time of growth and development for Masonry in California. Interest in Masonry continues to rise with over 1,900 applications for membership reported in this fiscal year. While the average age of our membership is 67, the fastest growing segment of membership is between the ages of 18 to 30 years old and renewed efforts in candidate education and member retention, including the new Member's Guide and a new Engage and Retain Guide, are already delivering results.

This year, our Office of Philanthropy reported the highest levels of donations by our members since 1987 and the Masonic Homes of California and the California Masonic Foundation continued to provide exceptional service to our members, widows and mothers. Expanded MSAP programs, volunteer work with local schools and a new program to fund nursing education extend our charitable presence in the community.

As we look ahead, we will continue to promote member vitality and prosperous lodges and work to raise the profile of Freemasonry in our communities throughout the state.

Your Grand Lodge leadership is focused on continuing proactive engagement with our membership and working with the lodge leadership, assisted by Grand Lodge committees, to ensure that our lodges remain dynamic centers that foster respect and brotherhood among members, promote Masonic values and serve as hubs for civic leadership and philanthropy in our communities.

Your Grand Lodge staff remains committed to serving our membership with the highest standards of graciousness, responsiveness and efficiency. Our motto is "How much good will I do today?" and, while

maximizing return on budget dollars, we are increasing our capacity in key areas including membership and program services, communications, finance and board governance. We're making special effort to use the member Web site as a more effective resource, making it easier for lodges and members to access and download resources and complete important forms and training programs online.

It seems a fitting symbol that our celebration of the 50th Anniversary of the California Masonic Memorial Temple includes the restoration of the endomosaic mural by Emile Norman (so generously supported by our membership) and the rededication of the cornerstone. Our Grand Lodge is focused on the renewal of Masonry in California and we rededicate ourselves to the virtues of brotherly love, relief and truth.

Making the world a better place Our vision and strategy

🔿 ur vision of Freemasonry in California is a relevant and respected fraternity committed to attracting, developing, and retaining members of high quality who seek self-improvement and opportunities to make a positive difference in their communities. Through the study of our heritage and dedication to new and ongoing Masonic education, members understand and can apply the tenets of Freemasonry.

Our vision is measured by member vitality, lodge prosperity and the general awareness of Freemasonry throughout California, all of which are the focus of our strategic plan.

Member vitality

California Masons are informed and wellconnected to their lodges, to the Grand Lodge and to Masonry worldwide. They understand and practice what it means to be a Mason both inside and outside the lodge. They actively develop their Masonic knowledge and share it with others.

Lodge prosperity

A lodge is a brotherhood of Masons who attract and develop leaders, retain guality members, and inspire pride in the membership and the community.

Community awareness

California communities are aware of Masonry's mission and values through lodge activities and programs that improve public education and the general well-being of fellow citizens. Lodges and the Grand Lodge effectively use the Internet and local media to connect with their communities.

Cornerstone Society

A planned gift to the Masonic Homes of California or the California Masonic Foundation is a way of ensuring the continuation of fraternal support and relief for future generations. The Cornerstone Society celebrates the legacy of donors to California Masonic philanthropies who have chosen to provide for the future through their charitable estates. We are grateful for their support.

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hilanthropy has been a tradition for California Masons for more than 158 years. In order to live out our enduring tenets of brotherly love and relief, we raise funds from within the fraternity to support those programs to which we have dedicated ourselves.

Three charitable giving milestones were reached from July 1, 2007 through June 30, 2008:

- Total annual fund contributions from California Masons for one year were the highest since 1987
- Total number of California Masons who contributed increased over the previous year for the first time since 1984
- Online giving topped \$100,000

Thank you to the more than 7,000 California Masons as well as the many lodges and Masonic organizations for your generous contributions. While space does not allow us to list all donors, please know we are grateful for all contributions.

Gifts by Individuals

More than 1,300 California Masons made a charitable gift of \$158 or more to Masonic causes. The \$158 Anniversary Level of giving represents one dollar for each year of Masonry in California and celebrates our long history of relief and charity. We thank all who generously gave individual gifts.

Gift was made online

Italics: Grand Master Circle Level donor for 3 consecutive years

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- 1 Solomon's Staircase No. 357 Carl J. Cupp, Master
- 2 Three Great Lights No. 651 Dennis A. Alvord, Master
- **3** Ionic Composite No. 520 Don S. Wijesinghe, Master
- 4 North County Daylight No. 843 17 San Francisco No. 120 Henry D. Ruppel, Master
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- 8 Conejo Valley No. 807 David H. Lieberthal, Master
- 9 California No. 1 John A. Bermudez, Master
- **10** Placerville No. 26 Daniel C. Segalas, Master
- **11** South Bay No. 421 Amando De La Rosa Enrico, Master
- **12** Downey United No. 220 Michael Lee Yolton, Master
- **13** Beverly Hills No. 528 Berry L. Griffin, Jr., Master

Lodges with 100% Officer Participation in **Annual Fund**

All officers of the lodges listed below contributed to the Annual Fund, demonstrating true 14 Columbia-Brotherhood No. 370 leadership and commitment to Masonic philanthropy.

> Bicentennial Daylight No. 830 Peter N. Kerhoulas, Master

California No. 1

Ionic Composite No. 520

Volcano No. 56

John A. Bermudez, Master Don S. Wijesinghe, Master

Christopher P. Sienes, Master

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2007/2008 **Elected Officers** of the Grand Lodge of California

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Deputy Grand Master

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Grand Treasurer

Grand Secretary

Grand Lecturer





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