

ORDO TEMPLI ORIENTIS



U.S. Grand Lodge
U.S. Supreme Grand Council

PROCEDURE HANDBOOK
for Camp, Oasis and Lodge Masters and Their Officers

ROUGH DRAFT

**NOTE: THIS DOCUMENT IS NOT CURRENTLY SANCTIONED
BY THE ELECTORAL COLLEGE, BUT IS A WORK IN PROGRESS.**

PROCEDURE HANDBOOK

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PROCEDURE HANDBOOK

I. Introduction

This procedures handbook was written to help masters of O.T.O. camps, oases and lodges in the United States know the specific procedures necessary for performing most routine tasks. This document is not a policies manual; for policy information you should refer to the O.T.O. U.S. Camp, Oasis and Lodge Master's Handbook, hereafter referred to as the "LBM Handbook". For more information about obtaining that document, please see the procedure "obtaining documents" that follows.

A. Distribution

Any O.T.O. member in good standing has the right to view this handbook, but possession of a copy (physical or electronic) is restricted to Grand Lodge officers, subordinate Grand Lodge officers, and initiates of at least the K.E.W. degree, without the express permission of the U.S. National Grand Master General. This handbook is not to be circulated over the Internet except by U.S. Grand Lodge officers, and is not to be posted on the World Wide Web.

B. Organization

This procedures handbook is broken down into several specific procedures covering the creation, maintenance and closure of a local body. The procedures covered herein are only for the most common issues that may arise, such as which reports should be filed and where. This document does not and cannot cover all possible scenarios; in that case you should consult a Grand Lodge officer for assistance.

C. Definitions

Throughout this document, the term **should** refers to activities that are not required, but would help in the smooth functioning of the body or it's relationship with Grand Lodge or the public. The term **must** refers to activities that are required. If the term **should** is not used with a specific procedural step, that step is required.

D. A Note About Mailing Addresses

Please note that physical addresses and e-mail addresses are subject to change without notice. To verify the correct mailing address for sending e-mail forms, please check on-line at the OTO U.S.A. web site. Current mailing addresses for all officers and bodies are at the URL <http://www.oto-usa.org/govt.html>.

E. Required Procedures

All bodies **must** follow the procedures below in order to remain in good standing.

Each Body Master must join the Kaaba mailing list and maintain a current address
Each body must maintain a current mailing address and e-mail address

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Each body must notify the Internet Secretary of changes to web addresses
Each body must file treasury reports and annual E.C. reports
Each body that initiates must submit all required initiation reports

Each body **should** follow the other procedures outlined below in order to maintain the smooth operation of the Order.

II. Body Formation

Body formation relates to the specific steps that an O.T.O. initiate in good standing may follow in order to found a camp. For more information about the policies related to camp formation, please refer to the LBM Handbook, sections III A.

Procedure: Request To Establish a Camp

This procedure outlines the steps necessary to file for a new camp charter. A new camp charter may be established by three or more O.T.O. initiate members in accordance with the policies set out in the LBM Handbook section III A.

NOTE: The following may be complete bull. Please review

1. Obtain an application for Camp Formation. ### Where is this application form?
2. Fill out the form, and make sure it is signed with the civil name of the third degree initiate who will serve as camp master.
3. Submit the form with a non-refundable \$30 fee (checks made out to “Ordo Templi Orientis U.S.A.”) to:

Electoral College
Ordo Templi Orientis U.S.A.
P.O.Box 1433
Buffalo, NY 14225
4. The Electoral College may require additional information or exhibits from the applicant before voting on accepting or rejecting the application.

Procedure: Applying to promote a Camp to an Oasis or an Oasis to a Lodge

Once a camp or an oasis has fulfilled the specific requirements to promote to an oasis or a lodge, that body should apply to the Electoral College for a change in status. Specific policies as to the requirements that must first be fulfilled before a body may advance are outlined in the LBM Handbook, section III.

1. Obtain an application for an Oasis Charter or a Lodge Charter, as appropriate. ### Where is this form?

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2. Fill out the form, and make sure it is signed with the civil name of the current body master.
3. Submit the form with a non-refundable \$30 fee (checks made out to “Ordo Templi Orientis U.S.A.”) to:

Electoral College
Ordo Templi Orientis U.S.A.
P.O.Box 1433
Buffalo, NY 14225

Please note that other payment means may be worked out with the Grand Treasurer General. For more information, please contact the GTG at gtg@oto-usa.org

4. The Electoral College may require additional information or exhibits from the applicant before voting on accepting or rejecting the application.

III. Body Maintenance

The procedures below outline most of the regular procedures required for a Body Master and his/her officers to maintain the body. These include reporting requirements, initiation reporting requirements and contact information maintenance.

A. Local E-Mail Lists

While not specifically mentioned in the LBM Handbook, it is important that body masters and their officers join and participate in a number of mailing lists in order to be notified of any policy or procedural changes. Currently the O.T.O. uses the Yahoo E-Groups mailing lists for this, though this could change in the future.

A number of required documents for reporting is also maintained on the Yahoo E-Groups mailing lists, such as annual report forms and initiation report forms. It is important, then, to have e-mail and web access so you can obtain these forms as needed, as well as keep up to date with any changes to these forms.

The specific procedures outlined below cover the following mailing lists:

O.T.O. Body Masters Mailing List
O.T.O. Temple Builders Mailing List
O.T.O. Kaaba Mailing List

Procedure: Joining the O.T.O. Body Masters Mailing List

1. If you are not a member of Yahoo Groups, you must first join by visiting <http://groups.yahoo.com> and following the instructions to join.
2. Send e-mail from the e-mail account you wish to use for e-mail information to

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bodymasters-oto-usa-subscribe@yahoogroups.com

3. Someone will e-mail you for verification of your current status within O.T.O.

Procedure: Unsubscribing from the O.T.O. Body Masters Mailing List

1. Send e-mail from the e-mail account you wish to unsubscribe to
bodymasters-oto-usa-unsubscribe@yahoogroups.com
2. An automatic verification e-mail will be sent to your e-mail address. You must respond with the steps outlined in that e-mail to complete the unsubscribe process.

Procedure: Obtaining the LBM Handbook

Please note that the LBM Handbook's distribution is restricted to Local Body Masters, Grand Lodge members, and those duly authorized to view this document. Possession of this handbook by others, including other officers of the local bodies, is prohibited.

1. Using the e-mail address and password used in joining Yahoo Groups, go to the web page <http://groups.yahoo.com> and log in.
2. Under "My Groups" (on the left hand side of the page) should be a link "bodymasters-oto-usa". Click there.
3. Go to the "Files" area (listed on the left), and to the folder "Manual - Body Masters Handbook". Download the file "Handbook-USA.pdf"

Procedure: Subscribing to the Temple Builders mailing list

The Temple Builders mailing list is limited to III° initiates and above. It is recommended that body masters and officers of the required degree join that mailing list.

1. If you are not a member of Yahoo Groups, you must first join by visiting <http://groups.yahoo.com> and following the instructions to join.
2. Send e-mail from the e-mail account you wish to use for e-mail information to
temple-builders-subscribe@yahoogroups.com
3. Someone will e-mail you for verification of your current status within O.T.O.

Procedure: Unsubscribing from the Temple Builders Mailing List

1. Send e-mail from the e-mail account you wish to unsubscribe to
temple-builders-unsubscribe@yahoogroups.com

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2. An automatic verification e-mail will be sent to your e-mail address. You must respond with the steps outlined in that e-mail to complete the unsubscribe process.

Procedure: Subscribing to the Kaaba Clerk House list

The Kaaba mailing list is restricted to Body Masters only (other body officers such as secretaries and treasurers may not join). Information on the Kaaba mailing list is restricted to Body Masters unless otherwise indicated. Body Masters **must** join this mailing list and maintain a current e-mail address, or face closure.

1. If you are not a member of Yahoo Groups, you must first join by visiting <http://groups.yahoo.com> and following the instructions to join.
2. Send e-mail from the e-mail account you wish to use for e-mail information to
kaaba-clerk-house-subscribe@yahoogroups.com
3. Someone will e-mail you for verification of your current status within O.T.O.

Procedure: Unsubscribing from the Kaaba Clerk House List

1. Send e-mail from the e-mail account you wish to unsubscribe to
kaaba-clerk-house-unsubscribe@yahoogroups.com
2. An automatic verification e-mail will be sent to your e-mail address. You must respond with the steps outlined in that e-mail to complete the unsubscribe process.

Procedure: Changing E-Mail Address for any mailing list

1. Using the e-mail address and password used in joining Yahoo Groups, go to the web page <http://groups.yahoo.com> and log in.
2. In the top right bar, select "Account Info". You may be asked to verify your password again.
3. You should see a Yahoo! ID Card, containing a "Member Information" line. Select the "Edit" button next to "Member Information."
4. Under "Select Primary Email Address", change your e-mail address information, and select "Finished." You will be sent a notification to verify this account.

Alternately if you have multiple e-mail addresses and you want notification for different groups to go to different locations:

2. (alt) In the top right bar, select "My Groups". You should see a list of all the groups you belong to, and the e-mail address where messages for that group go.

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3. (alt) In the left column select the group whose e-mail address you wish to change.
4. (alt) In the upper right of the group's start page, select "Edit My Membership"
5. (alt) Next to your e-mail address, select "Add new email address".
6. (alt) Enter the e-mail address you wish to use to receive messages. You will be asked to confirm that address via e-mail; just follow the instructions provided by Yahoo.

B. Contact Information Maintenance

A local body is expected to maintain some form of contact information so that members of the Electoral College and members of the public may contact the local body master. This information must be kept up to date at all times; failure to do so may result in closure.

Procedure: Change of Physical Mailing Address or E-Mail Address

All bodies are expected to maintain a valid mailing address and a valid e-mail address. This information may be semi-public, so it is recommended (though not required) that body masters maintain a post office box. When the address does change, the following steps should be taken.

1. Obtain a new mailing address.
2. Notify the following officers of the new mailing address. This notification may be done through e-mail.

Grand Treasurer General	gtg@oto-usa.org
Grand Secretary General	gsg@oto-usa.org
Electoral College	electoral_college@oto-usa.org
Initiation Secretary	initiation@oto-usa.org
Internet Secretary	webmaster@oto-usa.org
Annual Reports Secretary	ec-delcampo@oto-usa.org
International OTO Treasurer General	heidrick@well.com
International OTO Secretary General	aion@snafu.de

3. You should maintain the old mailing address for a minimum of 30 days after notification is sent.
4. If you are changing your contact e-mail address, you may also need to follow the procedures in section IIIA above for mailing list membership.

Procedure: Creating a new Web Address

Local bodies may (but are not expected) to maintain a web site for distributing local event information and other relevant information. Specific policies for local web site

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3. Submit the form no later than 30 days after the close of the reporting period to

Grand Treasurer General
Ordo Templi Orientis U.S.A.
P.O.Box 45139
Los Angeles, CA 90045-0139
4. Questions about this form should be sent to the Grand Treasurer General at
gtg@oto-usa.org

Procedure: Submitting an Annual Report

Each body must submit by the 15th of February of each year a report of the activities that the body performed in the previous calendar year.

1. Obtain the latest annual report form from the Yahoo E-Groups Body Master's mailing list area by logging into <http://groups.yahoo.com> (see Procedures IIA above), and downloading the file Report_EC_Annual/??? where?)
2. Fill out the form with all relevant information. Be sure to list all information related to events, initiations and masses performed.
3. Submit the form to the Electoral College at:

Electoral College
Ordo Templi Orientis U.S.A.
P.O.Box 1433
Buffalo, NY 14225

Procedure: Submitting an Annual Report on the Web

An alternate method for submitting the required E.C. Annual Report form is to do this over the web. To do this:

1. Visit the annual report form web site at <http://www.oto-usa.org/???>
2. Fill out the form with all relevant information. Be sure to list all information related to events, initiations and masses performed.
3. Submit the form on-line by clicking on the "Submit" button.

D. Initiation Procedures

In general, bodies that initiate need to perform a variety of steps in order to smoothly perform an initiation. Failure to properly perform these steps may result in closure or in loss of a charter to initiate.

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Obtain an Initiation Application Form and give it to the applicant
Receive the Initiation Application; verify contents and forward to Initiation Secretary
Perform the Initiation. (This includes verifying payment of fees.)
Submit an Initiation Report
Submit Initiation Certificates for signature
Forward Initiation Certificates to the newly initiated

Procedure: Obtaining Initiation Application Forms

Oasis and Lodges, as well as Camps aspiring to become an Oasis, must submit separate application forms to the Initiation Secretary as they are filled out. Please note that none of these forms should ever be handed out in electronic form. Further, it is good practice to keep track of who these forms are given to, in order to control dissemination of these forms.

Policies surrounding Initiation forms can be found in the LBM Handbook, section IV C.

The specific initiation forms may be obtained by:

1. Log into the Yahoo E-Groups Body Masters list by logging into <http://groups.yahoo.com> (see Procedures IIA above).
2. Download and print the appropriate initiation form.
3. Download and print the Informed Consent Form

Procedure: Submitting an Initiation Application Form

Once an initiation application has been received, the following procedure must be followed.

1. Verify that all required information is supplied on the form by the candidate. If information is missing, please review with the candidate.
2. Verify that all required sponsor information is supplied.
3. Verify (if possible) that all initiation requirements have been met.
4. Verify that the signed consent form is filled out and signed and witnessed. Note that OTO Officers (including body masters) may not sign the witness line, so you may need to find a witness if this part of the form is not complete.
4. Send the form to the Initiation Secretary at:

Initiation Secretary
Ordo Templi Orientis U.S.A.
P.O.Box 720296

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Oklahoma City, OK 73172-0296

Procedure: Submitting an Initiation Report

Within 30 days of initiation, an Initiation Financial Report and an Initiation Financial Report must be submitted with a check for all Grand Lodge initiation fees collected.

1. Download the Initiation Financial Report (the “red book form”) from the Yahoo Body Master’s file area. (see Procedures IIA for joining Yahoo Body Masters). (The file is called ‘redbook.pdf’)
2. Fill out the form with all required information.
3. Submit the Red Book form, along with a check for all initiation fees and dues collected on behalf of Grand Lodge to

Grand Treasurer General
Ordo Templi Orientis U.S.A.
P.O.Box 45139
Los Angeles, CA 90045-0139

4. Download the Initiation Summary Report from the Yahoo Body Master’s file area from “Reports - Initiation Summary/Initiation_Secretary_report.pdf”.
5. Fill out all required information.
6. Submit the Initiation Summary Report to the Initiation Secretary at

Initiation Secretary
Ordo Templi Orientis U.S.A.
P.O.Box 720296
Oklahoma City, OK 73172-0296

Procedure: Submitting Initiation Certificates for signature

Within 30 days of initiations, Initiation Certificates must be obtained, filled out, and forwarded to the Initiation Secretary for signature and seal. The Initiation Certificates may be submitted alongside the Initiation Summary Report.

1. Obtain the Initiation Certificate artwork from the Yahoo Body Master’s file area. (see Procedures IIA for joining Yahoo Body Masters).
2. Fill out all relevant information and have the Initiator sign the form.
3. Submit the Initiation Summary Report to the Initiation Secretary at

Initiation Secretary
Ordo Templi Orientis U.S.A.

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P.O.Box 720296
Oklahoma City, OK 73172-0296

IV. Transfer of Mastership and Body Closure

How is all of this done?