



THE MOST WORSHIPFUL GRAND LODGE OF ANCIENT FREE AND ACCEPTED MASONS

OF THE
COMMONWEALTH OF MASSACHUSETTS

Membership Manual

The Working Tools: Recruitment, Retention & Engagement



**Developed by the
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Grand Lodge of Masons in Massachusetts**

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THE MATERIALS DISCUSSED HEREIN ARE INTENDED FOR THE BENEFIT OF MASSACHUSETTS LODGES AND THEIR MEMBERS, AND TO SUPPORT AND PROMOTE THE MASONIC TENETS OF BROTHERLY LOVE, RELIEF, AND TRUTH.

I. Preface

The Gift of Freemasonry

We know from our experience as Masons that being a member of the Craft is unique and rewarding. What better gift is there to pass on to a family member or friend than the opportunities found within membership in Freemasonry?

Many gifts fade away or lose their luster, but Freemasonry endures throughout a man's life. It can be passed on so as to reward and enrich the life of a son, relative or colleague. This fraternity has always been great because of its accomplishments, and because over the centuries, has helped men realize their own greatness.

It has been recognized that every lodge needs a Membership Development Plan. This plan, when put in place, will address three major areas. They include recruitment, retention, and engagement. We hope the following information contained within this manual will help guide you in setting up your own plan.

Consider the material as the working tools – the ideas and methods that can help your lodge go on to reward and inspire other men. However, just like any of the tools that you have in your garage or basement, they will not work unless you use them. The ideas cannot help your lodge if you don't put them into action.

The Grand Lodge Membership Committee wishes you great success in the growth of your lodge. Grand Lodge, and the whole Fraternity, will benefit from all your efforts. If you need assistance, you can seek the advice of your District Deputy Grand Master, or the Grand Lodge Membership Committee directly.

As we used to say in Freemasonry, "Just ask!"

II. Introduction

The purpose of this manual is to put forth some proven and successful ideas in order to assist lodges in their ability to recruit and retain new members, and just as importantly, to engage all of their existing members.

It is important for the fraternity to focus on all of the areas of membership development, or the program will ultimately fail. Bringing in new members, and getting them involved and excited about what is going on at the lodge, will go a long way in having them ask their family and friends to join as well.

When talking about membership development, we should be considering:

- What can we do to bring new members into the Lodge?
- What do we need to do with the new members to get them active in the lodge and to feel they belong?
- How can we get these new members, who have their own sphere of family, friends and colleagues, to want to introduce them to Masonry as well?
- How can we re-connect with our inactive membership, so as to get them back involved and attending regularly?

As a Membership Development Plan gets implemented in your lodge, you may find that the new members will be the lodge's best source for generating additional members. If we do not take the time to engage these new members and make them feel they belong, they may ultimately take a demit or get suspended, and our recruitment efforts will have failed. Getting new members involved in projects or programs that they enjoy greatly improves the chances that they will stay active in the lodge. It also increases the chances that they will encourage their friends to join.

A member's commitment to the lodge is no longer signified just because he has chosen to get in-line. Many of today's Masons have a desire to serve in other ways, so it is imperative that a lodge looks outside of its ritual needs alone.

Additionally, while the focus on new members is critical because their enthusiasm is probably at its highest, it is important that we remember to engage the existing membership. If some of the brethren are no longer coming back to lodge, what do we need to do to get them to return and involved? A member with years of experience in Masonry has stories to tell, and can share so much with a new member. We need to see to it that both the established brothers and the new brothers work together. This will help to form a healthy lodge.

An engaged membership is an active and healthy membership, and can easily build membership momentum!

Recruitment, retention and engagement all go hand-in-hand. In addition to recruitment, when a lodge engages and retains an active member, that member is more likely to feel a commitment to the lodge and his fellow brothers, and is less likely to become inactive. With these three dynamics working in sync, the entire membership process becomes much easier to manage

and make effective. These components of membership have many common themes, and they must be approached by a lodge in a comprehensive manner in order to be successful.

As you will notice in this manual, within the Recruitment, Retention and Engagement sections, there will be similar but somewhat different approaches offered. This has been done deliberately. It is to demonstrate some varied approaches to developing a plan, and underscore “the overlap” of all the parts that encompass membership development.

As we go through this manual, you will see how the three areas we have discussed, by having them work in tandem, are critical to ones success.

The Membership Committee of Grand Lodge would like to tell you that if you implement what we put forth in this manual, you will be immediately successful. Unfortunately, as we all know, each lodge has its own set of concerns and circumstances. In order to implement the Membership Development Plan we are putting forth, your lodge is going to have to do some homework first.

Before you can decide what you want to work on and the direction to go in, you need to first find out what areas you need to strengthen. We have broken this manual down into sections that build off of each other. We discuss recruitment, then retention and engagement. We include self-assessments that can garner needed information from current members as to how your lodge is currently performing. If you want to fix a problem, you have to first be willing to be honest with yourself. At the end of this manual, we provide you an outline to help you put your Membership Development Plan into place. This plan also includes developing a Mission Statement, the importance of effectively running the lodge, and working with the different personalities that make up a lodge.

III. Recruitment

Challenges

The whole concept of recruiting new members may seem foreign to many of us, especially long-time veteran members. But, it is one that Massachusetts Masonry must address if it is to remain in existence and vibrant.

Lodges also need to determine how relevant Masonry is in today's society. More directly, how are we contributing to our community, and are we visible within it?

- Is there currently a presence of Masonry in the community?
- Is enough being done to make our presence known?
- If not, then why?
- If so, is it positive or negative?
- Is there a need in the community that the lodge could help with?

How do we make Masonry relevant and attractive to prospective new members? Masonry, like most fraternal organizations, needs to once again become a primary topic of discussion. This is the 21st century. An individual's time is very valuable to them and the competition for that time is great.

Who or what is the competition?

- Work
- Family obligations
- The internet
- Instant messaging and text messaging
- Blogging and chat rooms
- Youth sports
- Cell phones and BlackBerries
- Cable television and on-demand programming
- Going back to school for career changes
- Other fraternal and social organizations

Look at the list. Many of items on this list weren't there five to ten years ago. But they are now! Technology, and our ability to connect electronically, is having a huge impact our fraternity. There is less and less personal communication and contact.

Masonry needs to adapt. Masonry needs to regain its traction in this technological age and become more relevant. It is not easy to do in the fast paced society in which we live, however, since 2005, Massachusetts Masonry has started to turn the corner.

In this manual, we will look at what Grand Lodge is doing to make Freemasonry relevant again. You will see how it is offering assistance in recruitment efforts and is also providing education and programming to help local blue lodges rebuild their membership and support structure.

It is certainly hard work and will take time. This endeavor comes on the heels of many years of not asking new members to join, but as we have seen with the rise in recent interest, Masonry in Massachusetts is turning around.

What is Recruitment?

The American Heritage Dictionary, 4th Edition 2000, has a lengthy definition, but these highlights certainly apply:

- To supply with new members
- To replenish
- To obtain replacements for or new supplies of something lost, wasted, or needed
- To regain lost health or strength; recover

Looking at these four bullets, it's easy to see how they apply to our fraternity. We unquestionably are in need of new members to replenish our ranks. We need to recruit new members to replace those that we have lost in the past several decades. As membership has grown recently, we need to continue the re-building process within Freemasonry. And, it's essential that we pass on a fraternity that is strong and respected to younger generations. In doing so, we will maintain our fraternity's vibrancy, relevancy and health.

With this in mind, Grand Lodge has made membership its top priority. It has launched many new initiatives to assist blue lodges in their capacity to increase their membership. The first initiative was the creation of a Grand Lodge Membership Committee. This manual is a result of the efforts of the Membership Committee, and was developed to assist lodges with recruitment, retention and engagement, and giving them some basic guidelines for getting a campaign underway and sustaining it. What follows are our suggestions for establishing a lodge Membership Development Plan.

Like all things, the results that lodges can expect to receive from the programs offered in this manual will only match the amount of time and effort you put forth in implementing the programs.

Recruiting new members is not easy, particularly when you focus on some of the keys words or phrases in the definition listed above; replenish, regain lost health, and recover. The inference is clear. Recruitment needs to occur because our organization, by definition, has declined or gotten weaker.

What is important to focus on is that we, the fraternity, have recognized this, and are acting aggressively and with a plan to change it. There is plenty of work to do, but if we truly have a commitment to pass on Masonry to future generations, we will succeed. In fact, the positive results have already started to occur. Between 2005 and 2007, over four thousand men have joined our fraternity. It's time to continue to build on that momentum!

The Recruitment Cycle

- I. Conduct a lodge self-assessment of how you have been encouraging new members, and the referrals of new members from existing members. This self-assessment may also want to include retention and engagement procedures (a self-assessment guide is provided later in this section).
- II. Develop or refine a Membership Development Plan. This comprehensive plan must encompass the three components of membership (recruitment, retention & engagement). Retention and engagement will be discussed later in this manual.

- III. Initiate new members. You want to clearly define a goal whereby you strive to meet specific membership numbers during a fixed period of time. Three to five years may be the best consideration.
- IV. Integrate new members into the lodge. Assess a new member's scope of interest and match them to the various functions within the lodge.
- V. Keep your members engaged with a strong retention program.
- VI. Review results and go back to step 1.

The Recruitment Cycle is not a one-time occurrence for a lodge. It is a long term and consistent cycle of educating the members to always be on the watch for good men who would add value to Masonry, and in which Masonry would add value to their lives. A lodge needs to work this cycle and always build upon it.

The Role of Grand Lodge

Grand Lodge wants to offer all the direction and support that is needed to give local blue lodges the ability to successfully recruit new members. This role is multi-faceted, and we will discuss it later in this section of the manual.

Internally, as a fraternity, we are taking many positive steps to develop and train our current officers and members in their ability to grow their lodges. The following should be viewed as tools and infrastructure our Grand Lodge has established to assist lodges with membership.

Grand Lodge Membership Committee: In 2005, the Grand Lodge of Massachusetts created a Membership Committee dedicated to recruiting, reactivating, retaining and engaging our membership. As hard as it is to believe, for a fraternity that is need of new members, there was never dedicated committee in place to increase the fraternity's membership.

The Membership Committee has developed numerous materials to assist lodges in the various aspects of membership development, including this manual. In addition, they have developed a number of other programs to encourage membership:

- **Square and Compasses Day:** state-wide open houses where blue lodges from across the state open their doors to the public.
- **One-Day Classes:** whereby a man can become a Master Mason in one day.
- **The Accelerated Degree Program:** whereby a man can become a Master Mason in approximately one month.
- **The Ambassador Program:** In 2006, the Grand Lodge developed the Ambassador Program. This program offered training to blue lodge members to be spokesmen and representatives for their lodges and the fraternity. In addition, Ambassadors are charged with working with new candidates to assist in getting them involved within the lodge.

The Ambassador Program is a new infrastructure between Grand Lodge, the individual blue lodges, and the local communities, to promote Freemasonry and cultivate membership. Lodge Ambassadors regularly report to the District Ambassadors, who report directly to the Membership Committee.

The program is continuing to grow with hundreds of Ambassadors having been trained and appointed, and with many lodges having more than one. It is essential for lodges to use their Ambassadors as a vital part of their membership recruitment drives. They are also found working closely with their District Ambassador when any assistance is needed at the District or Grand Lodge level.

- **The Masonic Leadership Institute (MLI):** Created in 1997, Grand Lodge created the MLI as a way to cultivate and develop leaders within our fraternity. In this program, participants are able to development many skills that directly impact recruiting new members, including public speaking and marketing.

The MLI has participants work on both team and individual projects, many of which, in recent years, have centered on membership. The MLI provides an excellent opportunity to try out new ideas and initiatives, and if successful, they may be adopted by Grand Lodge for the overall betterment of the fraternity. One example is the MYCHIP program which was a result of the MLI.

The MLI has hundreds of graduates, many of whom have gone on to leadership positions within our fraternity. It is a program that continues to grow in importance for Freemasonry.

- **The Master's Path:** A program that has been around for many years, and one that is updated regularly, is structured to be an extremely useful tool for a Master's use. It offers much needed information and suggestions prior to assuming the East of their lodge, and also guidance while serving their term. Having Masters who have the direction to lead and necessary skills to successfully govern their lodge, is vitally important to lodge growth, harmony and success.
- **Pass-It-On Program:** Grand Lodge implemented the successful Pass-It-On Program to encourage members of the fraternity to replace themselves in the craft and "Pass-it-on" to new brethren. The streamlined application form and application process has been very well received and has helped make the often cumbersome process of joining our fraternity much easier.

Grand Lodge has dedicated significant resources to rebuilding the membership of the fraternity through aggressive advertising campaigns, the hiring of a full-time communications staff position, and allocating resources to support the many membership initiatives that have occurred since 2005.

Recruitment Self-Assessment

To start any sort of a membership recruitment initiative, a lodge needs to undertake an honest and objective self-assessment of the lodge. It is important for a lodge to have a good sense of their overall condition so that they can realistically plan accordingly.

For strong lodges this is not as difficult to do. For lodges that may not have an adequate foundation in place, this could be a very difficult process. It is never easy to look in the mirror after many years of neglect and admit what's wrong. But, if lodges are going to begin the process of becoming revitalized and attracting new members to their recruiting efforts, it has to happen.

Lodges need to ask themselves questions, such as:

- Why did you join your blue lodge, and would those same reasons apply to a new person coming in? Does the lodge still have the appeal it did when you joined, no matter how many years ago? If not, why?
- Has your lodge raised any candidates in the last year, and if so, have they stayed active? If not, why?
- Does your lodge hold any social events that are open to the ladies and family members?
- Does your lodge hold any social events for the members such as Table Lodges, sports parties, etc.?
- Does your lodge have active service committees, or are they just names that are on the back of the notice year after year?
- Does your lodge financially support the community in any way such as a scholarship program, sponsoring a little league team, the Angel program, food bank, or perhaps adopting a site within the community to beautify?
- Does your lodge sponsor public events such as blood drives and MYCHIP programs for the community?
- Does your lodge march in local parades or participate in Town Days?
- Does your lodge participate in the many Grand Lodge initiatives such as Square and Compasses Open House Day and one-day classes?
- Does your lodge have someone who gets press releases into the local papers to get publicity for lodge activities?
- Is the membership of your lodge active, or is it the same few guys that show up every month?
- In sum, does your lodge offer things that would attract new members to join, and just as importantly, with the support of their families?

If the answer to the majority of these questions is “no”, a lodge has a lot of work to do in order to become vibrant again. The good news is that once a lodge can acknowledge they are deficient in certain areas; this is a pivotal first step in the road to recovery.

How a lodge gets the answers to these and other questions can be done in several ways. A paper survey mailed out to the membership may be a good way to try to assess where the lodge now stands. Technologically savvy lodges might be able to conduct an on-line survey that may work, but can be problematic for older members who may not have access to the internet.

Once a lodge has their survey results, they should put together a focus group to discuss these results and start thinking about ways to fix the problems that have been identified. The focus

group should be lead by someone who can work with the group to elicit whatever information is needed to correct the issues, and to ultimately design a successful Membership Development Plan. Additionally, this lead person should be someone who is a neutral party within the lodge and doesn't have a pre-existing agenda of their own.

Lodges may also want to find a strong sideline brother to lead the discussion, as opposed to the Master or the Secretary, who may have a stake in maintaining the status quo. The ultimate objective is to meet the desired goals that came out of the self-assessment and focus group. It should also include the recruitment of new members, and re-activating existing members. This will help to energize the lodge.

All lodges, whether strong or weak, need to recruit new members in order for our fraternity to survive and grow.

Recruiting: A Plan of Action

Lodges need to establish a membership committee with at least three brothers, but preferably more. These men need to be enthusiastic and strong spokesmen for the fraternity. Lodge Ambassadors would be the likely candidates to serve and hopefully lead this committee.

Once in place, the lodge membership committee:

- Should meet and review the guide for setting up a Membership Development Plan. They should spend time brainstorming about the different aspects of recruitment, retention and engagement, and how each will be addressed.
- They should give some serious thought as to the current condition of the Lodge. There are many questions to consider. For example, how has attendance been? What are their personal observations? Have there been any significant changes recently? You may want to include your Master in this meeting as well (assuming you aren't the Master).
- Schedule a meeting with the Master and Wardens, and provide them with an overview of the Membership Development Plan. You also want to offer your thoughts and opinions' following the committee's earlier brainstorming session.
- The Master should schedule an allotted time at a Regular Communication whereby the committee can present and explain the program to the brethren. Consideration should be given to allow the committee members to put some questions to the floor at this time. Ask the Brethren what they like about their Lodge, or if there are changes they would like to see? If you are thinking of doing a survey, tell them. Ask for their suggestions and their feedback.
- Surveys - many Lodges have tried them with varying results. Generally, only a small percentage of surveys are returned. Give plenty of thought as to what you hope to achieve and how you can possibly motivate the Brethren to complete and return them. If surveys are completed and returned, you may gain some valuable insight as to what the brethren like, don't like, and if they are not coming back to lodge, maybe some explanations as to why.
- Because this program is so important, it would be ideal if the committee members aren't active on other committees. This program should be a primary focus of the lodge, and time is of the essence.

- When you get responses from the brethren from the survey, and/or at the communication, determine one thing you could do right away that would inspire someone to come back to Lodge, or keep someone from leaving.
- Stay focused, and starts your new programs/projects slowly.
- Once the program starts to grow, more members can be brought in to handle other projects.
- For lodges that want to remain vibrant and moving forward, don't postpone the start-up of this important program.

The overall health of the lodge, based upon the self-assessment and member input, will impact the recruitment and membership plan a lodge develops. Typically, a plan needs to have goals or benchmarks that they should strive to achieve. The plan should also take a longer view of three to five years, in order to properly measure success.

The plan should include:

- Measurable membership goals:
 - I. How many new members will the lodge work to bring in each year of the plan?
 - II. How many of the new members stayed active?
 - III. How many of the new members became officers?
 - IV. How many of the new members became active on service committees?
 - V. How many new members sponsored new applicants?
- Identifying and reaching out to prospective members
- Host a social function, and invite prospective members and their families where appropriate
- Invite prospective members to a MYCHIP event, a blood drive, or some other charitable event
- What are the best avenues to market your lodge to the prospective new members
- Develop a Membership Application Packet to have ready to handout to those expressing interest (inc., an introduction letter from the Master, "What it means to be a Mason" pamphlet and DVD, a history of your lodge, etc.)
- Follow-up's in place to be ready to ask the applicant if they would like to join

Additionally, with Grand Lodge lowering the age for membership from 21 to 18, if a lodge is near a college or university, they may want to consider incorporating a College Recruitment Plan into their overall recruitment plan.

Lodges need to set membership targets for the duration of the plan. It can be percentage based, or a fixed number per year for however many years the plan is scheduled for. Lodges should be both aggressive as well as realistic.

For example, let's say over the course of a five-year plan, a lodge targets that by the end of year five, they will have a total of at least fifteen new members. Ideally, their plan is to obtain five in the first year. The second year they will be up to seven new members, the third year nine, the fourth year twelve, and at the fifth year, they will have obtained their planned outcome of at least fifteen new members. Remember, a lodge cannot determine if they have been successful unless they make their plan measurable, with specific membership goals and objectives.

Finally, if the lodge's plan is well executed, the new members joining should help bring in additional new members, and as such, the benchmarks for each year of the program should trend upwards.

Additional benchmarks could include:

- The retention rate of the new members
- How many attend lodge functions?
- How many involve their family at family events?
- How many continue to attend Lodge of Instruction?
- How many choose to join the District Deputy for a Fraternal or Official Visit?

The more benchmarks or metrics that a lodge has to measure against, now allows the lodge's membership committee to more accurately evaluate their recruitment effort and the ensuing results.

Identifying potential new members: A lodge should take the time to engage the existing membership, and develop a list of names of people they know from the community whom they believe may be willing to consider membership in Freemasonry. Who are possible prospects?

- Friends
- Neighbors
- Relatives
- Co-workers
- Sons, sons in-law, nephews, grandsons and uncles
- Father's of DeMolay and Rainbow members

One of the ways to introduce a potential member to Masonry is through their attendance at a local event. The individuals you have identified should receive a personalized letter and invitation from the Master of the lodge. This invitation would invite them to a planned social or membership event, and where the person can start to get a "flavor" for the fraternity. The letter should be followed up with a phone call from the membership committee to get a commitment of attendance. It is important that this event be well-planned and well-executed. First impressions are lasting impressions.

Some events that have proven to be successful and appealing to prospective members are:

- Motorcycle trips
- Golf outings
- Cigar dinners
- Barbecues
- Super bowl party, or other sporting event parties
- Fishing trips
- Affordable sporting events, like college hockey or minor league baseball games

The marketing of your lodge is of critical importance to reinforce the value of Masonry, its image, and to convince a potential new member that their decision is the right one in wanting to become a member of the Masonic lodge. What are the benefits of joining your lodge?

What are some ways you can market your lodge?

- An informative, attractive, and easy to navigate website.
- Press releases to local newspapers promoting events at the lodge.
- Participation at public events (booths at local fairs, sponsorship of sport teams, Saint John's Sunday at a local church, etc)
- The appearance of the lodge building. It needs to be kept clean, well-lit, maintained, and well-maintained, and with good signage.
- Having knowledgeable members as public speakers.
 - I. Members who can go on local access shows or create their own local access shows and speak about Masonry in the community.
 - II. Members who can go before other organizations such as the Chamber of Commerce, the Boy Scouts, DeMolay, the Rotary, etc., and speak about the Craft.

As stated earlier, people view their time as important and the competition for their time is substantial. In marketing the lodge, more than anything else, we need to emphasize the value of membership in Masonry.

The first question that lodge members need to be ready to answer from a prospective new member is, "Why should I become a Mason in your lodge?" If a member of your lodge, or specifically, a member of the membership or recruitment committee cannot answer that question, then any plan to recruit new members is bound to fail.

Some possible suggestions would be:

- To be a part of a positive, charitable and community based fraternity
- To be able to support scholarship programs and blood drives
- To be a part of something that is bigger than one's self, and makes a real difference in the community
- To be a part of a fraternity that is family friendly and is built on the foundation of friendship, morality and brotherly love

These aren't bad selling points to start off with, but if a lodge puts its' mind to it, they can certainly come up with a significant list of benefits it can offer to prospective new members.

In the sales industry, companies spend lots of man hours and money trying to develop their own Unique Selling Proposition (USP). The USP is what makes the company different from all the other companies out there. Why it is better, more efficient, more cost sensitive, better products, etc. The unique selling proposition is why everyone they meet should want to do business with them.

Your lodge needs to develop its own unique selling proposition. In this manual we talk about writing a lodge Mission Statement. This will be the time that you can brainstorm with other lodge members to think of your own USP.

Why is this important? Because you need to be able to answer, why should someone want to join your lodge instead of another lodge? Why join the Masons over the Elks, the Moose, or another social organization? If people have limited time, and we know they do, they won't be joining everything. Right now, can you give clear and legitimate reasons why Freemasonry should be their choice? Get the lodge members involved in this discussion, because they will be promoting the Craft as well as lodge officers and committee men.

What else do we need to focus on in order to make Masonry last?

- Remember that in everything we do, we have to make people feel they belong and that they can contribute
- Increase the level of fellowship and enjoyment before and after each meeting
- Handle the business portions of the meeting in a more efficient manner
- Have at least one member-centered activity or event at each meeting
- Make every effort to try and limit the length of each meeting
- Involve the family more at meetings and events
- When a member doesn't show up for a meeting, follow-up with them
- We are all brothers. There is no reason why an individual should ever be standing alone at a lodge function or meeting, and no one taking the time to include them

Lodges also need to be sensitive to the fact that often they are not only selling Masonry to the prospective candidate, but also to their significant other and family.

What can we do to include family participation?

- Children's Holiday Parties
- Ladies' Nights
- Trips to a dinner theater
- Scholarship programs for the children
- MYCHIP programs
- Shriner's Circus or Rodeo

These are the type of things that broaden the appeal of the fraternity because it doesn't exclude the family. It takes into account the importance of having everyone being proud of the fact that this man is a Mason, and more support will come from home because of it.

Lastly, the lodge needs to **"be prepared to take an application"** when a prospective new member inquires. Committee members, and for that matter, all members, should have "Pass-It-On" applications ready to be filled out when the occasion arises.

It is no longer required to wait until someone asks to ask to be made a Mason. If a prospective member has taken part in a lodge sponsored event or charitable function, and assuming he has a positive impression, it is a good time to ask him if he would like to fill out an application for membership. He may request to take it home, but you should encourage him to fill it out right then so you can answer any questions he may have. If it is taken home, the member should follow-up within a few days to see if there are any questions, and ultimately, to arrange to pick-up his completed application and fee.

The Importance of Integration & Engagement

Once a lodge has a new member(s), it is critical that they move quickly to integrate them into the lodge. As was mentioned earlier, people will come back to an organization because they feel they belong. It is the responsibility of all the members to see to it that they take the time to go up and introduce themselves to the new member(s). New members still have a lot of questions, are still getting comfortable with protocol, and know very few of the men at the meeting. No one wants to feel embarrassed or out of place. There should be a committee

designated to make sure new members are introduced around, have people to sit next to during dinner and in the lodge room, and let them know what is happening at the lodge as a whole.

An important point to remember, is that typically, an organization has a brief window of perhaps six to twelve weeks to engage a new member and retain them as an active member of the lodge. It is critically important that lodges reach out to the new brother after he is raised and help him find his niche in the lodge.

Some ideas that a lodge should consider when planning their integration strategy:

- **Lodge Ambassadors** - Do we have enough, and are they the right people to help integrate new members? If not, the lodge should look to grow its Ambassador Program to accommodate this critical role of integration.
- **Lodge Mentor Plan** – Assign new members a Mentor who is close to the same age as the candidate and shares similar interests.
- **Personal touch** – A letter to the candidate from the Master of the lodge welcoming him to his new lodge. Additionally, a letter from the Master's wife to the new member's wife can also be very effective.
- **Fellowship** – The lodge needs to make sure that the current membership understands the needs of the new members. Also, to assist them during the degrees and once they become members. A pro-active lodge that engages its new members will go a long way to make the assimilation into the lodge more enjoyable.

By engaging new members through Lodge Ambassadors, Mentors, and an overall pro-active membership, a lodge can quickly identify areas of interest that the new member may enjoy.

- **Lodge Officer** – Is the new member interested in joining the line of the lodge?
- **Service Committees** – Is the new member interested in becoming active in some of the lodge's various service committees or activities?
- **Building or Hall Associations** – Is the new member a better fit helping out on the Building or Hall Association?
- **Functions** – Is the new member a good organizer, and perhaps a good match for running lodge functions?

Identifying a new member's interests and getting him onto the right committee(s) of the lodge is of critical importance. Pressuring a new member to become an officer because the lodge desperately needs officers, and not because the new member wants to become one, is a mistake and is a sure fire way to lose a member.

If our fraternity is going to continue to grow and prosper, than recruitment must be an ongoing process. It is not just a one-time event, or a three or five-year plan, that temporarily gives the lodge a boost and they can then rest on their laurels.

The recruitment process must be a continuous cycle, and one that should get easier with each successive cycle. Lodges should be bringing in newer and younger members, and they will become the starting point for the next cycle of recruitment. Additionally, with the lodge growing and becoming more active and known within the community, its relevance will increase and that will further help recruitment efforts.

How can we determine if the recruitment portion of our Membership Development Plan has been successful?

First and foremost, the benchmarks that were established within the recruitment plan will give the bottom-line indicators of success or failure. Were the benchmarks achieved, exceeded, or not met? As previously mentioned, plans must have measurable benchmarks and goals in order to try and objectively determine a plan's success or failure. **Plans that do not have measurable goals and benchmarks are most likely going to fail.**

Over and above the benchmarks, there is certainly the more subjective way of sensing whether the plan succeeded or came up short. The best way to do this would be to undertake another self-assessment of the lodge.

Perhaps not all of the benchmarks were met, but if substantial progress was made since the previous self-assessment, this is good news. The bad news is that the job is not done.

IV. Retention and Engagement

Introduction

This section represents the final two segments in developing your Membership Development Plan. Ideas are presented to summarize methods and activities from active and successful lodges that have strong memberships and lasting vitality. It is meant to provide initiatives to help re-engage a lodge that is having member retention problems. You can turn to these techniques for guidance in finding ideas and methods in helping to uncover root causes of possible problems, and develop processes to address them and engage the membership.

Retention and engagement go hand-in-hand. You will not have long-term retention if you do not engage your brethren.

There is no "magic pill" that will solve a lodge's membership retention problems. Active and successful Lodges have demonstrated certain characteristics that keep their members coming to meetings and participating in the Lodge. There is an old adage that says, "If you always do what you've always done, you'll always get what you've always gotten." So, you have to find new and different ways to address problems. If a Past Master says to you, "We have never done it that way before," then, perhaps, it may just be the solution you need.

What is Retention and Engagement?

Retention results from engaging your members. Not as dues-paying no-shows, but as active and interested brothers who regularly attend meetings and enthusiastically participate. They get in-line as an officer, work on committees, run programs, cook dinners, visit shut-ins, etc., because they want to.

Retention and engagement is just a part of the broader issue of membership. It does not encompass the process of bringing in new members. It is involved with engaging the hearts and minds of those who have signed the by-laws. The burning issue that needs to be addressed in retention and engagement is, "Brothers Jim Smith and John Jones are no longer attending meetings or participating. How can we recapture their interest?"

The following are some steps taken by successful lodges to ensure an active and energetic lodge community. These ideas are presented as the "Ten Commandments". If your lodge is having difficulty retaining members, maintaining good attendance, or keeping new members active, consider how the programs and activities embodied in these "Ten Commandments" might help you change direction.

The Ten Commandments for Ensuring an Active and Engaged Lodge

1. **Communicate with every member of the Lodge**
 - Call in-state and out-of-state members regularly
 - Send birthday and holiday cards
 - The Service Officer should be aware of sickness or distress
 - Know who is not doing well and needs help
 - Send flowers and cards for funerals

2. **Have an active Masonic widows program**
 - Visit Masonic widows regularly
 - Send holiday cards and/or flowers
 - Invite them to a special ladies night as guests of the lodge
 - Provide assistance as needed
3. **Greet every member at every meeting**
 - Have candidates serve as greeters at the Lodge door
 - Shake every member's hand at every meeting
 - Introduce Masonic visitors and those helping with the meeting
 - Thank the officers and Past Masters for their help and support
4. **Understand the needs of your members**
 - Ask what programs the members want
 - Survey the members and respond to their feedback
 - Adjust your plans according to your member's desires
5. **Get to know your member's families**
 - Have family activities that bring families to lodge
 - Be involved in community activities that include family members
 - Know when special events are happening in a member's family
 - Spouse and children's birthdays, graduations, awards and prizes
6. **Ask your members to take an active role in the Lodge**
 - Encourage new members to participate in the Master Mason Rookie Award program
 - Create jobs to enroll as many members as possible
 - Keep them active and involved
 - Don't create "busy work," make it real.
 - Make everyone feel needed and appreciated
7. **Plan your work – Work your Plan**
 - Make the Grand Master's Award a goal
 - Develop a Five-Year Membership Development Plan
 - Involve all officers in planning process
 - Each officer has a part to play in the Five-Year Plan
8. **Show your appreciation to your officers and members**
 - Certificates of Appreciation
 - Recognition dinners
 - Honored guest(s) at Table Lodges

9. Be proud of your Lodge

- Take an active role
- Don't get discouraged when things don't change quickly
- Be an innovator and driver

10. Be the catalyst for your Lodge

- Be enthusiastic, energetic and committed
- Be a creative leader that brings excitement to your lodge

To help you even further, we have outlined a five-step guide to address issues related to membership retention in your Lodge. If your lodge doesn't have a problem with membership retention, congratulations! A review of this program may offer some thoughts to consider in your future plans to keep your lodge active and vital as you move forward.

On the other hand, if it is obvious that your lodge has sparse sidelines, and/or you are having a problem filling the officer-line, you can greatly benefit from using some of the processes and ideas contained in this plan. You don't need to do everything. However, you need to find at least a couple of things to do, and do them now!

The five steps are:

- I. Understand the scope of the problem
- II. Know the strengths and weaknesses of your lodge
- III. Develop your Membership Development Plan for your lodge
- IV. Work the Plan
- V. Measure success

A key concept in this plan is to know what your membership wants in their lodge and then to give it to them. There is a well-known line spoken in the movie Field of Dreams, and it is "If you build it, they will come." So, if you build a strong and active Lodge membership, sparse sidelines should cease to be a problem.

Step 1: Understand the Scope of the Problem

Methods to Assess the Condition of Your Lodge

Brainstorm with the Brethren. Include everyone who is willing to offer opinions. It is also important to make a concerted effort to reach out to members who are not that active, so as to solicit and include their feedback. This is important because including responses from only the active members will not give the lodge the full scope of information it requires, in order to make effective decisions regarding changes that need to be made. Every brother needs to feel wanted, as well as knowing their opinions count and are a valued part of the solution. Encourage brothers to buy into the concept of improving the lodge. Be sure to include the points-of-view and ideas of everyone, along with discussions from different segments of the Lodge membership. Then, compare and combine ideas.

Consult your Lodge officers. Lodge officers offer the perspective of those who run the lodge. Encourage them to think in broader terms.

Consult your Past Masters. Past Masters offer experience and leadership. Avoid ideas being derailed with the “we never did it this way before” model. Encourage them to think in broader terms also.

Surveys

There are many types of surveys available to fit your needs. Decide what you want to ask and choose your questions accordingly. The survey should not be too long or tedious. Do not allow the respondent to lose interest in the task at hand.

Survey Contact Methods

- **Face-to-face interviews.** Personal contact is the most appreciated and open means of communication. Body language can answer many questions. You may find that those Brethren who have been away for a while may want to talk, and you may have difficulty keeping the conversation on track. Keep to the points at hand without seeming disinterested in what your brother has to say. You will need a group of individuals to interview the respondents because the process is very time-consuming.
- **Phone.** Telephone your demographic to present the survey and obtain instantaneous responses. Be aware that the responses may not be as open as those that are obtained by face-to-face interviews. You may find that those Brethren who have been away for a while may want to spend some talking also, and you may have difficulty staying on topic. As above, keep to the points at hand without seeming disinterested in what your Brother has to say. You need a group of individuals to make these calls because this process can be time-consuming also.
- **Mail.** Mail the surveys to the chosen demographic with instructions to mail the responses back. Set a deadline for the responses and stand firm by the deadline. Telephone follow-up is necessary with a mailed survey.
- **E-mail.** Similar to a mail survey, but limited to those with e-mail access. Telephone follow-up should be a standard process.
- **On-line.** Again, similar to the mail survey, but limited both by the lodge’s ability to set up an on-line survey, as well as the members’ access to the internet.

Evaluating the Results of Your Survey

Evaluation forms allow you to categorize and analyze all the data collected in an easy-to-understand format. This can be done in a number of different ways, including pie charts, percentages, and frequency distributions.

Of course, there are some data you may want to consider recording in full. For example, if there are any comments made by brethren regarding specific problems or issues. For this reason, you should have a separate sheet of paper to be able to categorize them properly. This may include:

- *Severity of complaint* -- is it important or frivolous?
- *Commonness of problem* -- how many brethren feel the same way?
- *Difficulty of solution* -- can it be fixed, and if so, how hard would it be to fix?

In situations where names may be needed to arrange transportation, send birthday cards in a given month, etc., simply make a list of the pertinent information and leave enough space to assign another Brother the task. This ensures both responsibility and accountability on both sides.

Step 2: Know The Strengths and Weaknesses of Your Lodge

Analysis Tools

The simplest way to go about understanding your Lodge and its capabilities is to analyze its strengths, weaknesses, and available resources. The resources available to your lodge may be physical (e.g., the lodge building), financial, or personnel (i.e., the members).

SWOT Analysis

One of the most popular ways in which businesses assess their current status, as well as opportunities or obstacles which lie ahead, is by identifying their **Strengths**, **Weakness**, **Opportunities** and **Threats**, or **SWOT**, for short. This business tool can be applied to many situations, including the status of your lodge. There are many books available on the subject, should you or your lodge brethren wish to learn more.

Creating a SWOT might seem simple, but it can get complicated because a SWOT can be as broad or as narrow as you need it to be for a given situation. For example, you could do a SWOT based on the overall state of the lodge facilities, or you could narrow it down to look at how difficult trying to implement a single event would be.

When creating a SWOT, you need to consider many different areas. At the same time, it's important to keep each area organized. For example, if you are dealing with putting on a special fundraising dinner, the assessment may proceed along the following lines:

Objective: Conduct a Fundraising Dinner

Strengths:

- We have Brethren who enjoy cooking.
- Brethren who can help with catering.
- A lot of Brethren came to these dinners when we had them before.

Weaknesses:

- Budget - How many people can we feed for a reasonable price?
- Physical space - How many people can we fit comfortably in the Lodge hall?

Opportunities:

- Can we entice Brethren to return to Lodge with this dinner?
- Can we give someone an opportunity to do something they have always wanted to do?

Threats:

- What if the building is rented out?
- Do we have the financial resources?
- Do we have the manpower?

This is an easy example and it may seem too simple. However, when you itemize your details, you are far less likely to be surprised if a problem is to arise. You most likely will have already prepared for it in advance of making any commitments, and to be fair, the SWOT is much more practical when done on a large scale. Especially in conjunction with a five-year plan.

What if your weakness is a weak officer line? This should never be a reason a lodge does not work candidates. If a lodge is looking to launch a Membership Development Plan but is concerned that they could not properly confer the degrees if they did get an applicant, they should reach out for help. There is nothing worse than degree work being poorly conferred upon candidates.

There are many degree teams around the state that can confer degrees with due notice. Additionally, reaching out to other lodges in the district will likely yield good results as well. Lodges should not be afraid to ask their District Deputy Grand Master in soliciting help from around the District.

Developing a Member Skills List

One of the best things you can do for your lodge is to develop a “member skills list”. You can start with the information you garner from the surveys, but you can also simply call or sit down with your brethren and ask them! Also, note that a skills list is not necessarily limited to someone’s occupation. An engineer may like to cook, but no one has asked him to help with collations. By knowing what your brethren can do, you can help them to get involved in the activities of your lodge.

A skills list serves many purposes:

- You know who is a resource, and are they available?
- What resources are able to be filled by the members?
- You now know who would be willing to help with specific events or ideas
- You know what your Brethren do for work and their hobbies
- You can share resources with other lodges in your building, or area, who may not have that particular resource
- You can introduce Brethren to candidates with similar skills and interests
- You can introduce one Brother to another, who may be a resource he needs.

You can organize your skills list any way you choose, but a few things are essential:

- The member’s name
- Their Lodge (only if the list is going to be distributed or available to a larger group, as opposed to just within a Lodge)

- Skill(s) – What skill sets are available and when?
- Contact information
- Where the person is willing to work? (i.e., distance from home, types of jobs, other Lodges, etc.)
- If a fee will be expected for services performed, and if so, how much?

Note: It is important that we do not overuse, or fail to acknowledge, those Brethren who offer their useful skills. If we do, they will eventually stop helping. For the brethren you will have on this skills list, it is imperative to get their permission if you are planning to share their information among multiple Lodges. And, in fairness, most Brethren who earn their living in a trade should be paid a fee if they are asked to do a long-term task or job. This includes roofing, plumbing, electrical work, etc., for the lodge.

Step 3: Development of the Membership Development Plan

The importance of planning for future success cannot be overestimated. This step is where you start to create your own comprehensive plan. The more people that can be involved in the process, the more success you will have.

1. Create a Mission Statement

To ensure everyone in your lodge is operating on the same page, so to speak, it is essential to formulate a lodge Mission Statement. For example:

Symbolic Masonry is a fraternity of men with a mission to:

- Promote the tenets of Brotherly Love, Relief, and Truth.
- Improve the individual character, leadership, and spirit of our Brethren through relevant programs.
- Inspire men to support the principles of the organization.
- Promote family and community values.
- Strengthen and promote Symbolic Masonry and its worldwide brotherhood.
- Serve mankind through the impact of its extensive charitable outreach

What does *your* Lodge have as its mission?

2. Set Measurable and Meaningful Goals

A lodge may aspire to several goals. As you formulate your mission, start thinking about just what it is you and your fellow lodge members are trying to accomplish through the active duties of the lodge. Here are some examples:

- Understand the make-up of the Lodge and what the brethren desire
- Make it attractive to want to belong to your lodge
- Build closer working relationships with Grand Lodge and other Masonic-based organizations

- Be an organization that is managed effectively
- Be led by men with effective leadership skills
- Be recognized as a fraternal organization, committed to philanthropy and community service
- Be active in the community at-large
- Have the support and backing of all the families within the lodge membership
- Develop and implement an aggressive retention and engagement program that reduces attrition, encourages and develops future line officers, and improves attendance
- Develop teams or committees that specifically encourage participation, involvement and retention
- Conduct critical reviews of meetings and other Lodge functions, and adjust accordingly
- Determine your current retention figure, and how do you now get that percentage higher? Establish it as a goal to strive for.

3. Specify Your Objectives

A lodge may eventually have several specific objectives it wishes to accomplish, such as:

- Implement and continually update your Membership Development Plan
- Provide supportive and regular feedback to all the Brethren
- Conduct “Focus” groups to assist our brethren in achieving success, and determining ways of increasing participation
- Sponsor and coordinate programs of interest for our Brethren and their families
- Understand the changing needs of families in today's society, and how this relates to and affects the individual Mason, and the lodge as a whole
- Develop a long-term sense of commitment to the Fraternity
- Establish widows and family programs
- Increase and support youth awareness and interest in the Fraternity through DeMolay, Rainbow, and similar activities
- Develop a detailed program for the orientation and education of candidates
- Have DVD's and literature available for Masonic education purposes
- Develop special programs of interest for members, their families, and the community
- Assure an ongoing commitment to your lodge's retention initiatives
- Explore areas of mutual interest with your brethren
- Build and strengthen partnerships with other lodges, for mutual program development and membership retention
- Improve and encourage interactive communications within the lodge
- Always be on the look-out for men with effective leadership skills who can assume positions of responsibility within the lodge
- Identify leaders in the community and recruit their support
- Increase the involvement of our brethren in charitable programs
- Establish criteria to be used in promoting membership
- Enhance and expand relationships with related Masonic bodies.

An integral part of developing your Five-Year Plan will be to identify the objectives your lodge wishes to accomplish. That process will require active engagement with your members if it's to be successful. How should this be done? This is where effective lodge management comes into play.

Step 4: Work the Plan

Where do you want to go? There are many ways to keep in touch with your brethren. Be creative! Plan variety and strive for an interesting balance between your degree work and social programs. Degree work is fine, especially if you are blessed with a number of candidates. Although remember, "all work and no play makes Johnny a dull boy". It also makes him a bored Mason, and one who could turn away to other pursuits of enjoyment and he may be lost to the lodge forever.

If you have a lot of degree work, decide how you can "mix it up" a little so there is a variation each month and brethren don't get tired of the "same old thing". In addition to having your traditional degree work on meeting nights, you could run a degree on another evening, or possibly a weekend; invite a degree team in to perform the ritual; have your lodge's Past Masters do the work; or, a step-up night is always enjoyable. Maybe you can invite another lodge to have their officers do the work in your lodge, and the next month, your officers go to their lodge to do work. With a little extra thought, the brethren will enjoy what you have done to add some flavor to a meeting night.

Although it's nice to bring in others to do the ritual, the Master needs to remember that lodge officers must know their work, and they must work the three degrees. Even if you have to borrow candidates from other lodges, or exemplify degrees for other lodges.

This responsibility having been addressed, consider other special programs that can be planned during the year, such as:

- A Past Masters Night, honoring an active Past Master by allowing him to conduct a degree team of other Past Masters.
- A Brothers Night, with a Past Master conducting a Degree Team consisting of Brethren. What a wonderful way to keep their interest up and to uncover likely Officer material.
- Special Degree Teams, such as York or Scottish Rite or the Masters Group of some specific year.
- Fraternal Visits by lodges, either from within or outside your own District or Grand Jurisdiction with the visitors doing the work of the evening.
- Special programs of Masonic Education and/or Instruction.
- Special non-Masonic programs in the lodge room for family and friends of members.
- An Awards Night for the presentation of long service and other pins and certificates.
- A Table Lodge (or a Ladies at the Table, to include the women)
- Social functions for the brethren and their families, such as an annual Ladies Night, a Night at the Theatre, Christmas or Holiday party, barbecue, fishing trip, etc., and don't forget to include the widows of deceased brethren.

If you are the Master of your lodge, and preparing your long-range plan for the year, take full advantage of the expertise available. Just because you are the leader, does not mean that you must carry the ball at each meeting. Use the resources of your own lodge and do not forget to utilize the District talent available to you. There are District officers in a number of disciplines who are eager for the opportunity to participate in Lodge meetings.

Step 5: Measure Success

What Constitutes Effectiveness?

For the purpose of this plan, effectiveness can be defined as “the attainment of the desired or intended outcomes of your Membership Development Plan.” What are the goals and objectives of your plan? Are they vague or specific? The more specific your goals, the easier it will be for your lodge to identify the desired outcomes. Thereby determining what you need to measure and evaluate as the plan is implemented.

How Is Effectiveness Measured?

A well-designed and properly executed plan identifies multiple goals, based on the assessment of lodge needs. Multiple goals probably mean multiple effectiveness measures, but not necessarily. Lodges with more modest objectives may feel that a single measure, such as attendance at the monthly Communication, is a sufficient basis for assessing effectiveness. However, if your lodge is interested in tracking multiple outcomes (e.g., sideline attendance, number of Brethren attending Lodge of Instruction, number of non-Masonic guests attending Lodge events), you will need to take that into account when developing your effectiveness assessments.

What goals were identified in your lodge’s plan? If the primary goal is to increase sideline attendance at the monthly Communication, a logical way to assess your plan’s effectiveness is to determine how many sideline attendees your lodge had, on average, for the three to six months prior to plan implementation, and then track monthly attendance in the future. You can use the absolute numbers, or you could state the attendance as a percentage of total lodge members. At any future time, you have the ability to calculate changes relative to the pre-plan time period.

Measurement Methods

1. Establish Your Baseline: What Makes Sense?

It’s important to set an appropriate baseline against which to measure progress toward goals. The problem is that lodges often do not have the data at-hand to know how to set that baseline. For example, while many lodges keep monthly attendance (which is now required in the Lodge Secretary’s Monthly Report to Grand Lodge), some have not done so. Thus, these lodges may have to estimate their attendance in the months prior to the implementation of the retention portion of their Membership Development Plan, if they want to track changes in attendance. Keep these possibilities in mind when deciding what outcomes you want to track. Otherwise, you may have a hard time collecting historical data, against which, your future efforts can be compared. If you don’t have historical data, that’s okay. You can move forward with your plan and collect whatever data you need, as opposed to doing nothing at all!

The time-frame over which your baseline is determined may be important to consider. For example, if you want to track changes in sideline attendance over time, you may want to consider if there are seasonal variations that need to be taken into account such as “snow birds”, who are not around in the Winter months. In this case, it may make sense to develop a three- or six-month average against which to compare. Alternatively, you could compare the current month’s attendance to the same month in previous years, much as department stores do to assess changes in sales.

2. Conducting Interim Assessments: How Often?

This is your decision. There are no firm rules to follow in this regard. Just beware of the “dieter’s dilemma” where constant scale watching (or, in this case, attention to data), can be counter-productive. You may want to track some outcomes on a monthly basis, and others on a less frequent basis, such as quarterly.

3. Report Findings to Your Lodge

It is essential that results be reported back to your lodge brethren in a timely fashion. Again, there are no firm guidelines for how often, or how detailed these reports need to be. One strategy for reporting this information is via the Monthly Communication. This ensures that the information is delivered to not only those who attend lodge regularly, but also to your out-of-state brothers, and to those who may receive courtesy copies of your lodge’s notice.

Membership Recognition

As an organization where members donate their time, it is important that we do not forget to recognize those men who have given so much of their time, skills and efforts. Most men will tell you that they will do whatever they can to assist in Masonic charities and lodge programs because it is their desire to help others. Although this is most generous, the Master must always be aware of the need to recognize a brother when the time is right.

When you take the time to honor someone, it has to be meaningful. You cannot present someone with an award or medal, and expect it to have any value, if the lodge hands it out on a regular basis. It must be a tribute to someone who is worthy.

Below is a list of some of the recognitions that are available to our Masonic brothers. They include:

Birthday and Masonic Anniversary Cards - On the Blue lodge level, you have an opportunity to recognize your members in several ways. One of the easiest ways to recognize your members is with Birthday cards and Masonic Anniversary cards. No special presentation is made to the brethren for these, but it is a welcome gesture from the lodge on these two dates during the year. When a brother has been away from the lodge for a period of time, either because of health or distance, it will be appreciated by them that they are remembered. The older a members gets, the likelihood is that they are receiving less and less cards. Remember that a lodge notice, or a dues bill, is not considered personal contact with your members.

Certificates - Another way to honor your members is with certificates. This can include a certificate for the most candidates sponsored during the Masonic year. It can be for service in catering meals for the brethren; coordinating a function held within the community; the most blood donated during the Masonic year; the person who reached out the most to the sick and shut-ins of the lodge; the biggest contributor to the local food pantry, etc. Certificates are easy to print up and have framed, and if they are truly earned, they will be appreciated.

25-year and 40-year Lapel Pins – This is a nice presentation that can include a member's family if possible, and can be made during a District Deputy's Official of Fraternal Visit. These milestones offer the lodge the opportunity to honor a regular attendee of the lodge, or to invite a member back to lodge. If a brother cannot attend a meeting, get a group of members to go out to their home to present it. If agreeable, take pictures that can be added to your lodge notice or website, and include some personal information about the brother. People want to know that they have not been forgotten.

The Lewis Jewel – Although this is normally applied for by a lodge member, the Master could take it upon himself to have the lodge do the research and make the application for the Jewel. If you know a member's father was a Mason in good standing, how meaningful do you think this would be for a brother to be brought to the East of their lodge, and be presented with the Lewis Jewel that included their information, along with their father's information? Maybe a brother wouldn't apply for the Jewel because of the cost, or they didn't know the details. This is an opportunity for a lodge to do something quite meaningful.

Through Grand Lodge there are several honors available to a worthy brother. These include:

50-year Veteran's Medal – When a brother has reached fifty years since his raising, Grand Lodge has a beautiful 50-year medal that is presented to them from the District Deputy Grand Master. The presentation can be made in their home lodge, or if because of relocation, it can be made in another lodge of their choosing. It can also be presented at their home if they'd prefer. This is another good opportunity to include family and friends when the presentation is made.

60-year Lapel Pin – This is an award that is very special in being presented. It is a distinct honor when a member has reached the sixty-year mark of being a Mason. We may never know what is truly on the mind of a man who has been a Mason for sixty years, but we can be certain that many things have changed since they were raised. At this point in a man's life, they may not be as active as they were in the past, but they are no less vital to whom we are as Masons, or who they are as members of our lodge.

Joseph Warren Distinguished Service Medal – This honor is bestowed on someone who has offered years of service to the Masonic fraternity. The proposed recipient is nominated privately to the Grand Master by the Worshipful Master. There are specific criteria that must be met in order for Grand Lodge to award this Medal, related to one's service to lodge, community, and house of worship. If approved by the Grand Master, it reflects a Mason's long-term commitment to the Craft. This is a medal that must be reserved for those who truly deserve it. If it is handed out on a yearly basis at your lodge, it diminishes its prestige and the stature of this Medal, and minimizes those men who have justly earned it.

Henry Price Jewel – This medal is presented to a Mason directly by and from the Grand Master. It is for services provided to the Grand Lodge, or the Grand Master personally. It cannot be applied for by a lodge. This honor is reserved for very few in the Craft, but it is recognized as quite a privilege to be singled out by the Grand Master for your contribution.

There are many other ways a lodge can recognize their members. Just remember, make whatever you do meaningful, and be sure that the brother is deserving of the honor and the recognition. People want to know that their efforts are contributing to the Craft, and we must be vigilant in taking the time to single out these men and show them that they are appreciated.

Summary

As was noted in the Introduction to this manual, the ideas presented here are not intended as the “be-all and end-all” of membership recruitment, retention and engagement. The fundamental premise of the program outlined here is simple:

- Identify the issues or problems facing your Lodge
- Assess the means at your disposal (i.e., strengths and weaknesses) to address these issues
- Develop a workable plan with measurable goals
- Don't delay, work the plan!
- Evaluate what worked and what didn't, and what corrections were made
- Your resulting progress toward goals

To conclude, a lodge needs to develop a realistic and measurable Membership Development Plan. This means taking into consideration what has been discussed in this manual, as well as incorporating issues that pertain to the lodge and then work the plan until success.

We hope the ideas and concepts presented in these pages will help you formulate a strategy that works wonders in your lodge. Best of luck as you and your lodge embark on a successful future!

V. Common Themes and Conclusion

Having concluded reading this Membership Manual, it should be apparent that there are a lot of common themes running through all of the components of membership.

- The need to do an assessment of the condition of the Lodge.
- Determining what the members want from their Lodge.
- Developing a measurable Comprehensive Membership Plan.
- Assigning officers and members roles to make the plan successful.
- Successful membership development must involve all of the members, new and old.
- Making periodic assessments as to the success or shortcomings of the plan, and adjusting accordingly.
- Membership Development must be an ongoing process for all of our lodges.
- Successful membership development will build momentum for further membership development.
- The leadership and all of the members need to be committed and ready to work together to grow their membership.

The Membership Committee hopes that all of our Blue Lodges take these Working Tools and put them to work in order to establish a successful membership development plan. With these working tools, lodges now need to set the craft to work to build our fraternity's membership.

VI. Credits

Appendices B, D-I

“Ideas To Improve Lodge Attendance Participation and Membership”

“North Shore Navigators” MW Arthur E. Johnson Class of the Masonic Leadership Institute
Mason Russell, Advisor

Dan Hering
Donald Moran
Neal Packard

Gordon Lothrop
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Appendices L-N

“Lodge Implementation Readiness Assessment (LIRA)”

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Appendices & Credits

Grand Lodge of California, “Pass it on” Program (sections V & VI)

Grand Lodge of Massachusetts, Membership Committee, Retention Manual. (section VII)

Grand Lodge of Massachusetts, Membership Committee, College Recruitment Manual.

Grand Lodge of Massachusetts, Masonic Awareness Committee, Blue Book

VII. Appendices

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Appendix A Developing a Lodge Membership Survey

One of the most valuable tools available to the Officers of a Lodge is a Survey of their membership. Surveys allow the Officers to gain valuable information about the interests and opinions of their membership. There are thousand of questions that could be asked in efforts to analyze the individuals who have joined the particular Lodge and it can be a daunting task to create a survey that will be effective. To assist in helping navigate the process we have include some simple guidelines to keep in mind when creating your survey.

The first key to a good survey is to keep the survey simple and too the point. Surveys with questions that require written answer will quite often be placed on a pile of other documents to be completed later, and then forgotten. A survey that is simple to fill out and is concise will elicit more responses. The two types of questions most commonly found on these types of surveys are “Yes – No” questions and “Select the best choice” style questions. Below are several examples of each.

Yes - No

Do you attend Lodge on a regular basis? **YES NO**

Do family commitments/work prevent you from attending Lodge? **YES NO**

Does the financial obligations prevent you from being as active as you would like? **YES NO**

Is transportation difficult for you in regards to traveling to and from Lodge? **YES NO**

Do you feel you have things in common with your brothers in Lodge besides ritual and the Lodge meeting itself? **YES NO**

Would you attend more meetings if there were more “Social” activities? **YES NO**

Does your family support you in your Masonic activities? **YES NO**

Do the Lodge Officers do a good job with their ritual? **YES NO**

Do the Lodge Officers do a good job with the management of the Lodge? **YES NO**

In your opinion is the Lodge growing? **YES NO**

Select the best choice

The idea with the “Rate these” style question is to allow the individual to evaluate the importance of each subject asked within the questions. Typically there is a scale picked to be used to rate the questions, such as from “Poor” to “Good” or “Agree” and “Disagree” or by using numbers like 1 to 5 with one being good and 5 being poor.

- The quality of Ritual in Lodge is	GOOD		AVERAGE		POOR
	5	4	3	2	1
- The Lodge has a lively social atmosphere	Agree				Disagree
	5	4	3	2	1
- The meals at Lodge are affordable	Agree				Disagree
	5	4	3	2	1

When creating your survey you may want to consider an area for the individual to make additional comments. This allows for them to make suggestions or comments that might not have been addressed in the questions of the survey. It may not be necessary to include a place for the Brother to identify himself. Keep in mind that the goal of the survey is to gain candid responses to help the Officers effectively plan the efforts of the Lodge. It is also important to keep the survey focused with questions that when answered will help the Officers create solutions to the tasks at hand. Lastly, include a cover letter that explains the survey and why it is being sent. If a brother chooses not to respond, than at least they will know that their Worshipful Master and Officers are serious about the Lodge.

Appendix B Telephone Tree

The objective of this tool is to boost sideline attendance. Keep in mind that this tool offers an effective technique when brethren need to be contacted in a timely manner.

Why Call?

A personal phone call is more effective than a mailed notice or email reminder.

- Concentrate on the members living within a specific radius of the Lodge, whose length of commute will not prevent attendance, and who are not regular Lodge attendees.
- From the above pool select those who are not restricted by health, age or physical condition. (Those who are ill or confined to home should be referred to the Lodge Service Committee.)

Who Calls?

- Divide the call list among the officers and lodge attendees. (This is an opportunity to get your sideline regulars more involved with Lodge programs.)
- Take into consideration friendships and prior associations when dividing up the list. A call from an old friend may be more effective than one from a new member who may be a stranger.

When to call?

- Seven to ten days before a meeting

What to include in your call.

- Reminder of the upcoming meeting, include itinerary of the evening and menu if appropriate
- Inquire into health of brother, spouse, family (information for service committee)
- Suggest the brother call and invite a fellow brother he hasn't seen in a while to accompany him to the Lodge
- Offer to make dinner reservations (possible free dinner incentive)
- Offer transportation if necessary (may need to recruit drivers or form a transportation committee)
- Inquire as to what programs, or functions the Lodge could provide which would rekindle his interest in attendance

When you learn information about a brother, add it to his Member Profile.

Appendix C Telephone Calling Procedures

The interviewer must be prepared. Research will be required to determine why the member stopped attending Lodge. This information is usually available. Remember, we know what the problem is, try to establish the cause.

In order to prepare oneself adequately for the interview, the following steps may help you:

- Review other discussions, which may have taken place.
- Go over any documentation, which may have been accumulated.
- Review positive accomplishments of this person.
- Have the correct facts to avoid an entirely corrective discussion.

Opening Remarks

Hello, Brother _____. This is _____ calling from _____ Lodge. *Did I catch you at a bad time?*

Types of Questions to Ask

- Our records indicate that you are no longer on our active rolls.
- Is our information correct or did we make a mistake?
- Perhaps we have failed to keep your interest:
 1. We don't want to lose you as a member.
 2. You have worked hard throughout your years as a Mason.
 3. You have an investment in your Masonic career.
 4. Did you join any other appendant bodies, such as the York Rite, the Scottish Rite or the Shrine?
 5. We need you back in the Masonic family.
 6. What can I do to help?

How to Close the Call

Make Good Judgment

- It will please our Master, the Officers and members to hear the good news.
- I am sorry to hear that you have bad health.
- We all have setbacks.
- Are you aware that part of your dues was set aside to help others?
- There is a process available to provide discreet financial assistance.

Appendix D Rusty Brother Program

Set aside a regular meeting or run a special communication to re-familiarize a "Rusty Brother" with Lodge protocol. Publish the event prominently in the notice - follow up with the telephone tree.

- Rusty Brothers need to know that they don't have to work their way into their own Lodge. A paid up dues card is sufficient.
- Ask active Brothers to invite a Rusty Brother (we all know some.)
- The Lodge may consider paying for dinner for all Rusty Brothers and their sponsors.

A suggested program may include review of:

- Due-guards and signs
- Review of Balloting procedures
- Passes, Grips and words
- Exemplify long form raising for proper floor work for procession
- Grand hailing sign
- 5 points of fellowship and the Grand Masonic Word
- Elaboration of Ancient penalties vs. modern obligation
- Review how to enter or leave an open Lodge
- Review how to visit another Lodge - Set Lights, Tyler's obligation, etc.
- Review of procedures for attendees of Masonic funeral service
- Exemplification of open/close, change over, when to sit, stand, give signs, etc.

Include enough information to make the evening worthwhile; but not so much as to intimidate a "Rusty Brother."

Appendix E Improving Public Relations

Masonry is not a secret society and we must promote Masonic Awareness. Each local Lodge should be doing this at every opportunity. Proper public relations will improve public awareness of the many positive aspects of Freemasonry.

- Appoint a chairman
- Collect the names of all area media outlets.
- Establish a local contact at each media outlet.
- The Grand Lodge's Director of Communications and Development, Bro. H. Robert Huke, IV, maintains a list – he can be reached at rhuke@massfreemasonry.org or (617) 426-6040 ext. 4211
- Don't assume that any radio, TV, cable or newspaper outlet is unapproachable. Cable outlets, for example, are soliciting content
- Ask the best way to send news items for the community calendar or feature pages (hard copy, fax or email)
- Prepare news releases that are well written and have all the pertinent facts. If the event is concluded, supply a picture in an acceptable form
- Follow up with the contact and thank them for running the item. Clip news reports and tell the Brethren about the local publicity

Appendix F New Brother Involvement

Getting new Brethren involved in important projects is essential to their continued interest in our fraternity.

- Make sure each candidate has a mentor
 - The mentor could be the candidate's sponsor, ***but the Lodge Ambassador should be involved in the process***
- Have a list of active committees and projects available for each new member
- Ask the new brother about his interests and match his interests with the needs of the Lodge
- Make sure the committee chairman communicates with the new brother and assigns a task
- Involve the new brother so as he is actually making a contribution
- Follow-up with the new brother and have him to make a report at the next lodge meeting
- Be ready to support him with the project, but not hinder his progress

Appendix G E-mail Communication

Use technology to communicate important and/or time- sensitive information to the membership.

- Masonic Funerals
- Special Communications
- Solicit e-mail addresses
 1. Monthly Communications
 2. Annual Dues Bills
 3. Lodge Webpage
- Build a Distribution List in Microsoft Outlook, Eudora, or other e-mailer software
- Distribute a reminder of the upcoming meeting 5 days before the meeting

Include the following information:

1. The program for the evening (No Candidates names mentioned)
2. The Dinner for the evening
3. A link to the Jr. Warden's e-mail for dinner reservations
4. The dinner reservation telephone number

Appendix H Improving Lodge Accessibility

When we think of the term “accessibility” with respect to our Lodge buildings, we often think about the obvious: How close is the parking to the building? Is there ramp access for our Brethren who have difficulty walking? Are the bathrooms handicap-accessible? Lodges that are strong and vibrant often find creative ways to **look beyond the obvious**. That applies in so many areas – including one as apparently simple as “how to make our Lodge more accessible to its members.”

As one example, many of our Brethren are sight-impaired. This can make reading of the Lodge Notice difficult, if not impossible. Others have hearing impairments. How might these conditions – or, rather, the inability to overcome the barriers posed by these conditions – contribute to lodge retention issues?

Some Lodges have come up with creative solutions to address these problems. At Dalhousie Lodge in Newtonville, one Brother has volunteered to make an audio recording of the monthly Notice to share with Brethren who are vision-impaired. The recording is recorded in the Apple QuickTime format and is made available via download or, alternatively, on CD. Other Lodges have developed “large print” versions of their Notices to facilitate reading. Simple ideas can have powerful results!

Appendix I **Masonic Widows Program**

- Secretary Sends Sympathy Cards from the Lodge
- Master appoints a Coordinator
- The coordinator should include Masonic Widows to help administer the program
- Start collecting names of Masonic Widows from:
 - • Member Profile
 - • Personal knowledge
 - • Feedback from solicitations in Communication
 - • Input from other members.
- Annual Masonic Widows event (Not around the Holidays)
- Masonic Widows Pins distributed at a Masonic Widows Event:
 - • Dinner or Brunch
 - • Arrange Transportation
 - • Food Baskets at holidays
- Create a communications pipeline
- Widows Team to become knowledgeable about resources:
 - • Masonic Home and contacts there
 - • Masonic Health Care and contacts
 - • Community Based Services
- Visiting Nurses
- Elder Affairs

Appendix J Membership Survey: Guidelines

Input from members is critical to remaining current with members. A useful survey is an excellent tool to reestablish and maintain communications with brothers who are not attending Lodge regularly.

Create an 8- to 10-question survey

Decide what you want to ask and choose your questions. The survey should not be too long and tedious.

Conducting the survey

1. Announce the survey in your communication so members expect a call
2. Have your officers conduct the survey at the specified times
3. Don't be critical of the answers... just collect the information

Ask open-ended questions, for instance

1. What do you enjoy most about coming to Lodge meetings? Why?
2. What can the Lodge do to rekindle your interest?
3. What kind of special programs would you like to see when no degree work is scheduled?

Collect some specifics

1. E-mail address
2. How many minutes to Lodge
3. Health and ability to travel
4. Verify marital Status
5. Do they want a Masonic Funeral

Most Important

1. Thank members for participating and assure them that their participation is valued and their suggestions will be considered
2. Compile the results and present them to members
3. Act on viable suggestions and tell members that you have done so

Appendix K Sample Membership Opinion Survey

Would you please indicate your choice by answering the following questions? Feel free to write on the back of the page or on additional pages if you need more room.

Q1 Is our meeting date unsuitable, if yes what is suitable?
How about the day of the week?

Q2 If you were Worshipful Master, what would you do differently?

Q3 How many social events should be held each year (excluding Installation and Official Visitations)?

0 1 2 3 4 5 6 more than 6

Q4 What Social Events would you be interested in attending?

Please label your choices by number with the number 1 having the highest interest. Make as many choices as you feel appropriate.

- _____ Bowling Night
- _____ Ladies Night
- _____ A Trip to the Casino
- _____ Golf Tournament
- _____ Attend a Baseball or Football Game
- _____ Bingo Night
- _____ Boat Cruise
- _____ A Day at the Races
- _____ A Night at the Theatre
- _____ Family Picnic

Other: _____

Q5 Do you attend lodge on a regular basis? Please mark yes or no. If no please state why?

The survey results will be used to determine the direction of our lodge for the future. Any direction would be put into a motion at a future meeting, discussed, and voted on accordingly.

Please return the completed questionnaire in the enclosed envelope before the next meeting.

Thank you in advance for your input and co-operation in this important manner.

Appendix L Sample Additional Survey Questions

Please rate the following activities or aspects of the Lodge by circling the appropriate response:

Quality of the Work	Poor	Marginal	Fair	Good	Excellent	N/A
Dinner	Poor	Marginal	Fair	Good	Excellent	N/A
Masonic Education	Poor	Marginal	Fair	Good	Excellent	N/A
Communication Level	Poor	Marginal	Fair	Good	Excellent	N/A
Telephone Tree	Poor	Marginal	Fair	Good	Excellent	N/A
Golf Tournament	Poor	Marginal	Fair	Good	Excellent	N/A
Ladies' Night	Poor	Marginal	Fair	Good	Excellent	N/A
Picnic	Poor	Marginal	Fair	Good	Excellent	N/A
Spring Dance	Poor	Marginal	Fair	Good	Excellent	N/A
Charity within the Lodge	Poor	Marginal	Fair	Good	Excellent	N/A
Fraternalism in the Lodge	Poor	Marginal	Fair	Good	Excellent	N/A
Mentoring within the Lodge	Poor	Marginal	Fair	Good	Excellent	N/A
The Monthly Communication	Poor	Marginal	Fair	Good	Excellent	N/A
Participation by Past Masters	Poor	Marginal	Fair	Good	Excellent	N/A

Additional Questions Continued:

How many regular lodge meetings do you usually attend each year?

(0) (0-1) (2-3) (4-6) (> 6)

Is our meeting time suitable for you? (yes) (no). If no, when would be better?

How many social functions do you usually attend each year?

(0) (0-1) (2-3,) (4-6) (> 6).

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What would encourage you to attend more frequently? _____

How well do the committees within the Lodge serve your purposes? _____

What interested you in joining our Lodge? _____

Of which appendant bodies are you a member?

York Rite Scottish Rite Shrine other _____

Do you regularly receive: The TROWEL? (Yes) (No)

Would you like to serve as an officer of our Lodge? (Yes) (No)

Would you like to serve on a committee of our Lodge? (Yes) (No)
If yes, which committee?

Would You like to do some ritual work? (Yes) (No)

Do you need a ride to lodge? (Yes) (No)

Can you drive for someone that needs a ride to lodge? (Yes) (No)

Appendix M Sample Lodge Membership Survey

Optional Information:

Full Name: _____
Mailing Address: _____
Home Address (if different from above): _____
Your Age: _____ How long have you been a Mason? _____
Marital Status: __Single __Married __Widowed __Divorced __Separated
Wife's Name (if applicable): _____
Children's Names and Ages: _____
Occupation(if retired, former occupation): _____
Home Phone# _____ Work Phone#: _____
Email: _____ Mobile Phone#: _____
Hobbies and Interests: _____

Use reverse side for additional space.

Questionnaire:

Membership

Please check any of the following that apply:

- | | | | |
|--------------------------------------|--|------------------------------------|--|
| <input type="checkbox"/> Past Master | <input type="checkbox"/> DeMolay/Rainbow | <input type="checkbox"/> York Rite | <input type="checkbox"/> Shrine |
| <input type="checkbox"/> Grotto | <input type="checkbox"/> Prince Hall | <input type="checkbox"/> O.E.S. | <input type="checkbox"/> Scottish Rite |

List non-Masonic Memberships: _____

Lodge Meetings:

I would want to/be able to, attend Lodge meetings more regularly if (*check all that apply*):

- Transportation arrangements could be made for me with a brother, door to door.
- I was in better health.
- I was better acquainted with the other members who would be there.
- There were more people my own age who would be there.
- It hadn't been so long since the last time I'd been there... I feel embarrassed.
- The meeting was a different day/time. (Like: _____)
- The meeting ended earlier.
- I could participate more actively in the meeting.

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- There was more social activity before and/or after the meeting.
- There were more dinners.
- I felt like it was important to anyone else that I was there.
- I were asked to go, or invited by another Brother.
- The meeting time / night did not conflict with other commitments.

I am more likely to attend the following type(s) of Lodge functions (*check all that apply*):

- Business Meeting
- DDGM Visits
- Degree Work
- Work Parties
- Table lodge
- Social Event
- Visitations
- Charity Function

General Questions:

Y	N	
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any interest being an officer and “going through the chairs”?
<input type="checkbox"/>	<input type="checkbox"/>	Would you be receptive to serving on a Lodge committee?
<input type="checkbox"/>	<input type="checkbox"/>	If you could make one positive impact to the future of your lodge would it be?
		<input type="checkbox"/> Officer <input type="checkbox"/> Committee <input type="checkbox"/> Widow Program <input type="checkbox"/> Trustee <input type="checkbox"/> Charity
		<input type="checkbox"/> Other

Overall satisfaction:

Please circle a number from 1 to 5 to indicate how strongly you agree or disagree, where 1(one) equals disagree and 5(five) is agree.

	Disagree		Agree		
The performance of good ritual at every meeting is important to me.	1	2	3	4	5
There are non-ritual activities/discussions at meetings.	1	2	3	4	5
Lodge meetings are interesting.	1	2	3	4	5
Lodge meetings are productive.	1	2	3	4	5
I feel obligated to attend Lodge meetings.	1	2	3	4	5
I enjoy going to meetings	1	2	3	4	5

Please use this space below to make any comments, or suggestions which you feel may be of benefit to YOUR lodge. We would like to hear from you, and draw from your experiences. You may have the idea that could make a difference.

Appendix N Survey Results Form

1. Survey Details

Survey sent date _____
Survey stop date _____
Number of surveys sent _____
Number of surveys returned _____

2. Brethren geography breakdown

Local _____
Beyond 25 miles in state _____
Florida _____
All other states _____

3. Brethren age breakdown	<u>25-40</u>	<u>40-50</u>	<u>60-70</u>	<u>70+</u>
Local	_____	_____	_____	_____
Beyond 25 miles in state	_____	_____	_____	_____
Florida	_____	_____	_____	_____
All other states	_____	_____	_____	_____

4. Brethren that wish to be on a committee or more active

4.1
4.2
4.3

5. Brethren that have requested assistance

5.1
5.2
5.3

6. Brethren that have submitted comments that should be considered

6.1
6.2
6.3

Appendix O Lodge Membership Development Initiative (LIRA)

Lodge Implementation Readiness Assessment (LIRA)

Prepared by: “Coop’s Troops”

**For inclusion in MLI presentation on
August 26, 2005**

1. Introduction

The LIRA is a key tool in a larger Member Development process. It is designed to help Lodge Masters internally evaluate and strengthen their lodge’s overall readiness and capability to successfully prepare for, implement, maintain, and support a successful lodge membership development effort within their lodge.

The LIRA template leverages the “weakest-link” concept; the LIRA’s main focus is to help the current and incoming wardens and Master confirm and document their lodge’s current overall situation including, but not limited to, elements such as:

- Goals
- Priorities
- Resources
- SWOT (Strengths, Weaknesses, Opportunities, Threats)
- Commitments
- Trends
- Demographics

and many other factors that will either contribute to or detract from the lodge’s efforts to implement a successful membership development effort.

The LIRA template is intended only to give the Lodge an idea of what it can use to accomplish its goals, and what might get in the way of its goals. It is not intended to give the nuts and bolts of implementing a Membership Development Program, nor is it in and of itself a Membership Development Program.

For the LIRA to be of maximum value to the Lodge, the Master should be the key enthusiastic sponsor of the LIRA. Completion of the LIRA should involve inputs from a range of other sources including, but not limited to, the following:

- Lodge Planning/Steering committee input
- All lodge officers
- Past Masters
- Coop’s Troops survey (and any other survey) results, if needed
- Any appointed lodge Membership Development Committee members
- Lodge committee chairmen
- External (non-Masonic) industry, and other market/demographic data

The LIRA results should be formally presented both in writing and in person to the Master and his planning committee, and also presented to the lodge members during a scheduled lodge meeting. It is the cornerstone of implementing a successful project. Since the results it offers are clear and concise, the contents can be quickly and easily communicated, understood, and used.

2. Assessment Questions

Lodge Goals:

a. What aspect(s) of Membership Development is your lodge going to focus on – this year, next year?

	This year	Next year
• Recruitment	_____	_____
• Renewal	_____	_____
• Retention	_____	_____

(Note: Reinstatement is not being addressed in the LIRA at this time as it is a focus area being addressed by Grand Lodge.)

b. What are the top three examples of membership problems your lodge is facing in each of those 3 categories, above, that you've selected to focus on?

Category	Top 3 "Membership-related" problems your lodge is facing		
	#1 Problem	#2 Problem	#3 Problem
Recruitment			
Renewal			
Retention			

<p>Comments:</p>

c. How critical do you consider your membership situation to be? An understanding of where your membership is now is crucial to deciding what steps you will take next.

How critical is your lodge's membership situation? OFFICERS' RESPONSES				
NOW	Very critical	Somewhat important	Neutral	Not critical
Recruitment				
Renewal				
Retention				
FUTURE	Very critical	Somewhat important	Neutral	Not critical
Recruitment				
Renewal				
Retention				
Comments:				

How critical is your lodge's membership situation? MEMBERS' RESPONSES				
NOW	Very critical	Somewhat important	Neutral	Not critical
Recruitment				
Renewal				
Retention				
FUTURE	Very critical	Somewhat important	Neutral	Not critical
Recruitment				
Renewal				
Retention				

d. How receptive is your lodge membership to trying new ideas to develop membership?

Comments:

e. List your lodge's SWOTs.

Strengths:

Weaknesses:

Opportunities:

Threats:

f. Community visibility of your lodge – What does your lodge do in the community that can be used to attract new members?

- CHIP
- Blood Drive
- Advertising
- Habitat for Humanity
- Angel Fund
- Charity work
- Parades
- Social / community events
- Other

Comments:

g. What are your lodge’s top 3 monthly, quarterly, and one-year membership goals for the each of the categories you’ve selected to focus on?

Category	Top 3 "Membership-related" goals you will focus on (<i>by category</i>)			How are we doing?
Membership Focus Category	Top three <i>Monthly</i> Goals (Be specific)	Top three <i>Quarterly</i> Goals (Be specific)	Top three <i>1-year</i> goals (Be specific)	How will these goals address the key membership problems you've identified?
Recruitment				

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Renewal				
Retention				

Comments:

h. List all potential new member target markets your lodge could focus on.

i. Current Lodge Activities – What is your lodge doing now that could be used to address membership issues?

Examples:

- Program committee
- Charity committee
- Membership committee
- Education committee
- Social committees
- Outreach committee
- Dinners
- CHIP
- Ritual/Rehearsals
- Other

Comments:

j. What membership development activities have worked well or not worked for your lodge?

Comments:

k. Other opportunities for Membership Development: - The reasons why men become Masons are varied. Realizing where new members may lie is crucial to keeping Lodge membership active at the level needed to run a Lodge.

- Speakers bureau
- Education
- Fundraising
- Social activities
- Community service
- Other

Comments:

I. In what ways are your lodge’s officers and members “on (or not on) the same page” regarding your assessment of your lodge’s membership situation and development needs?

Comments:

m. How do your lodge’s members feel about their lodge’s membership situation?

1. Is there a shared vision among members as to **what it means to be a Mason (IN THEIR LODGE)**
2. To what degree do the members feel there is a need for change – aka focus on membership development?
3. Are your lodge members open to new solutions to address membership development?
4. Who is affected (and how are they affected) by the level of active membership?
5. List any current lodge policies / rules / practices concerning membership development
6. What info is currently available on membership development in your lodge, district, or at GL?
7. Pamphlets, videos, signs, websites, speakers, other
8. What ground-work activities have been completed in the area of:
 - Lodge education / training on membership development
 - (Examples:) motivation, customer service, marketing, leadership, etc...
 - Media releases and other PR on lodge district events
 - Lodge activities that include membership as a key component
 - Membership-specific training with other related Masonic / non-Masonic groups
9. Who is committing time and resources to your lodge’s membership development
10. Identify local champions of membership development
11. List other useful contacts

Comments:

n. Community / Membership / Industry Trends - Being aware of demographic and other factors can aid in the creation of an achievable rather than an unrealistic goal.

Note any population shifts in your lodge's surrounding communities

Note any employment / employer shifts in your community

Note any ethnic composition and trends

Note any family composition trends

Note any occupational-type trends in your area

Note any other trends that may apply

3. Resource/Contact Information

a. Current lodge members - This information can help in locating a broad range of resources and planning how to deploy or draw on them effectively.

Category	How long have they been a Mason?					Total	Top Challenges	Possible Opportunities
	< 1 year	1 - 4 years	5 - 10 years	6 - 20 years	> than 20 years			
Current Membership								
Total Lodge Membership								
Approx # of living in area								
Approx # under 30 years old								
Approx # 31 - 50 years old								
Approx # over 50 years old								
# of members active in lodge (meetings / events)								
# of Single / Divorced / Widowed members								
# with wife & kids								
Total								

Comments:

b. Local Resources: - State why this is relevant to your lodge's membership development planning efforts.

Comments:

- Public parking
- Access to public transportation
- Local historic sites
- Top local employers
- Religious institutions
- Schools/colleges / trade institutes
- Hospitals
- Museums
- Parades / fairs
- Other local / seasonal events
- Other resources

c. Lodge Resources - What resources are available in your Lodge for members and their families?

Comments:

- Website
- Database
- Kitchen
- Lodge programs
- Training
- Education
- Building facilities
- Brochures / videos
- Skills
- Other

d. Other resources

Comments:

- GL contacts
- District and DD contacts
- Masonic Awareness officer
- Media contacts
- Municipal contacts
- Community contacts

e. Lodge Facilities - What do you have, and how are you using it?

Rooms	Purpose	ADA / access issues?	Strong points	Weak points	Capacity	% used per month	Condition	Opportunities for Membership

Comments:

4. Other Considerations

a. **Budget** – a different form may be used if available.

b. **Current and potential available funding sources for membership development**

#	Source	Detail	Useable Amount Available	Purpose	List any Restrictions	Contact	Comments

c. **Current / potential membership development funding uses**

#	Possible Use for funds	Detail	Estimated amount required	Desired outcome of funding this item	How will it be spent?	Contact	Comments

d. Conflicts / Pre-existing commitments impacting membership development efforts

- Time
- Money
- People
- Facilities
- Schedules
- Activities

e. Calendar

Comments:

f. Existing scheduled events / activities

Comments:

g. Tentative scheduled events / activities

Comments:

h. Recurring events / activities

Comments:

5. Supporting documents

- Lodge survey and distribution plan
- Project plan
- Strategic Plan (if available)
- Financial Statements
- Communications Plan
- Marketing Plan
- Training Plan
- Calendar of Events
- Candidate Applications
- Lodge member mailing, email, phone lists / databases
- Masonic brochures and other materials
- Masonic websites
- Lodge event / program fliers
- Budget
- Other

Appendix P **Feedback to the Membership Committee**

Name _____ Lodge _____

PLEASE COMPLETE THIS PAGE AND SEND TO:

Grand Lodge Membership Committee
186 Tremont Street
Boston, MA 02111

Ideas for new Programs

Do you have an idea for a Membership Program?

(Continue on back)

What worked in my Lodge

Do you have a Program that was a success?

(Continue on back)

What didn't work in my Lodge

Did you try a Program that really bombed??

(Continue on back)

Why did it fail??

(Continue on back)