

2

**FRATERNITY
PLAN
FINAL REPORT**

2



A VISION FOR A NEW DECADE

IN 2015, MORE THAN 7,000 California Masons came together through countless conversations, town hall meetings, and questionnaires to envision the future of the fraternity. The result of that yearlong exercise was the 2020 Fraternity Plan, a road map to guide the Masons of California into a new decade.

The 2020 Fraternity Plan centered on four key themes that emerged from extensive member feedback—and served as guides for the initiatives, philosophies, and procedures that have since grown out of the plan. By hewing to these themes, lodges have helped California Freemasonry prepare for the future.

REWARDING MEMBER EXPERIENCES
MEMORABLE AND MEANINGFUL DEGREES
STRONG LODGES AND HALLS
POSITIVE IMPACT ON SOCIETY

At their core, these themes all support the idea of building a strong foundation for the fraternity—for its members, its lodges and halls, and its Grand Lodge. The focus wasn't on quantity but quality. As ongoing social and demographic trends contributed to an overall drop in fraternity membership, these efforts were aimed at ensuring that the experience of Masonry remained as meaningful as possible for members and initiates.

As the fraternity once again turns its attention on the future, it's important to review the progress we've made—in terms of priorities, goals, and successes—as well as our shortcomings.

In reviewing the 2020 Fraternity Plan, it's helpful to examine each theme independently. By doing so, we can better evaluate the effectiveness of our initiatives and their continued relevance for the next decade.

The iconic endomosaic mural inside the California Memorial Masonic Temple.

1 REWARDING MEMBER EXPERIENCES

The heart of Freemasonry is friendship.

FEEDBACK FROM MASONS consistently reinforced that the foundation of all success was ensuring that the experience of belonging to a lodge was a positive one. Masons who have rewarding experiences in lodge are more likely to be engaged in the work of the lodge, to develop strong friendships with their fellow members, and remain in the fraternity for life.

Research shows that three main components create the kind of highly rewarding member experience that Masons seek: **making true friends, learning and improving oneself, and leaving an impact on society.**

By developing programming to support those priorities, lodges strengthened the foundation on which all other growth rests.

IN THIS SECTION

- A. Improving prospecting resources for lodges
- B. Enhancing lodge communications tools
- C. Increasing the fraternity's visibility
- D. Deepening leadership training opportunities
- E. Developing new lodges



A. Improved Prospecting Helps Raise Masons

Problem

Prospects and initiates fall away from the fraternity.

Solution

Create tools that reach, capture, and keep in touch with prospects.

Our first impressions are lasting ones. For the fraternity, that could be the difference between a lifelong member and a lost prospect. To that end, lodges asked for centralized prospecting administration and resources. Freed of the burden of paperwork, lodges are able to focus on getting to know their prospects as people and brothers. For prospects, it means not getting lost in the shuffle—and connecting on a human level with the people who may be their lodge brothers.

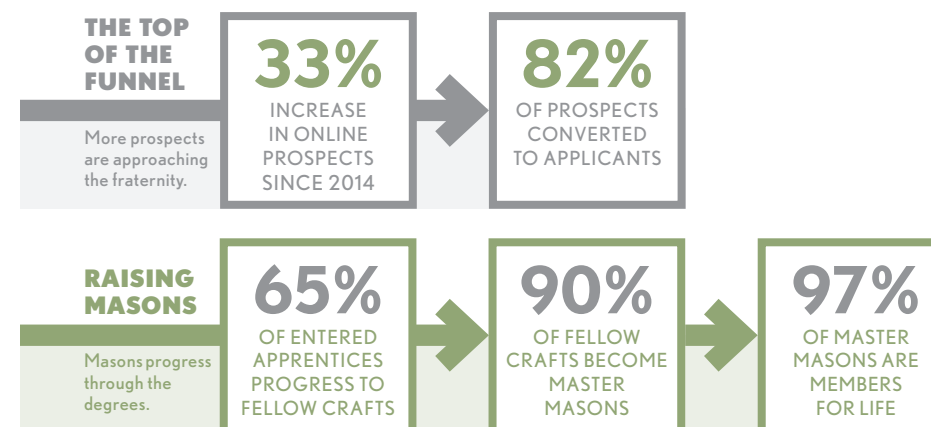
WHAT WE DID

- **Revamped our online presence:** New web form for prospects on freemason.org; updated prospect information processes on iMember.
- **Made sure we were seen:** Statewide Open House Month initiative introduced.
- **Created consistent messaging:** New training modules brainstormed at leadership retreats to provide a common language for lodges to use with members and prospects.
- **Developed a dashboard:** New and improved prospect-tracking dashboard included in iMember 2.0 rollout.

The Bottom Line

Are we effectively converting prospects into Masons?

Yes. Since 2010, two-thirds of all applicants have been passed; about 60 percent are ultimately raised as Master Masons. By widening the prospect pipeline, we're in a great position to retain more prospects than we ever have before.



B. Lodge Communications Support Engagement and New Membership

Problem Members—especially new members—are not kept abreast of fraternity programs and fall out of touch.

Solution Develop a set of consistent, effective communication tools to reach all California Masons.

Lodges build momentum through effective communications with members, prospects, and their communities. Lodges needed help keeping up to better connect with members—in particular, new and younger prospects.

WHAT WE DID

- **Built a megaphone: Lodge App launched October 2015 (and transitioned to iMember 2.0 in July 2020);** weekly email newsletter sent to all California Masons beginning in 2015; state-of-the-art lodge website templates launched in October 2016.
- **Prioritized comms:** Communications best practices incorporated into all annual leadership retreats.
- **Upgraded the Lodge App:** A new version of the app was included in iMember 2.0 (July 2020).

In 2020, 77% of lodges and 37 divisions used the Lodge App to communicate. The new iMember 2.0 system rolled out in July 2020.



The Bottom Line Are we retaining more members? Yes. While the raw number of initiates is down since 2010–15, the retention rate is up: 62 percent of those initiated in 2010–15 are still active Masons; of those initiated in 2016–20, 92.3 percent remain active.

MASONS OF CALIFORNIA
SOCIAL MEDIA
FOLLOWERS,
2015

MASONS OF CALIFORNIA
SOCIAL MEDIA
FOLLOWERS,
2020

153,285

15,000

C. Increased Visibility Equals Increased Pride

Problem The communities around Masonic lodges aren't familiar with the fraternity.

Solution Promote engagement with local communities through philanthropy and other lodge activities.

Successful lodges are visible within their community—through events, press coverage, and digital communication. Getting the word out helps build pride in the fraternity among members and creates trust within communities. Opening the doors to the lodge—both physically and online—emerged as a key priority.

WHAT WE DID

- **Went beyond the lodge doors:** More than 40 lodges participated in the Lodge Open House Month initiative in 2019. Yearly Public Schools Month celebrations brought public relations attention and goodwill. Lodges were supported through digital marketing campaigns targeting like-minded members near each lodge.
- **Updated our portals:** New websites for the fraternity (freemason.org), our award-winning magazine (californiafreemason.org), the Masonic Homes of California (masonichome.org), and the California Masonic Foundation (masonicfoundation.org) were launched between 2015 and 2020.

D. Deeper Leadership Training Builds Stronger Lodge Culture

Problem Lodges without their own unique culture are not as connected to the craft.

Solution Develop and promote leadership training that focuses on fostering individual lodges' culture.

Lodge leaders understand that when it comes to creating a rewarding member experience, there's no single solution. But if they're able to focus on developing lodge identity, they can create an environment in which members make true friendships, improve themselves, and take pride in the fraternity. Culture can't be centralized, but leadership training can be. So leadership training and curriculum have been revised to prioritize culture building within lodges.

WHAT WE DID

- **Got leaders trained:** The Lodge Management Certification Program was relaunched as a free, on-demand course. Today, lodge leaders are required to complete all four courses by the time they become master.

- **Developed new materials:** Curricula at Master and Wardens retreats focused directly on building lodge culture.
- **Targeted the absent:** Reached out to lodges with low Grand Lodge service-utilization records to invite them to retreats.
- **Updated curricula:** Each year, retreat agendas were refreshed as appropriate.
- **Created new tools:** Released free lodge leadership tips and resources online, including:

BUILD A VIBRANT LODGE GUIDE

LONG-TERM PLANNING GUIDE

LODGE HEALTH CHECK
THE 3-, 5-, AND
7-YEAR PLAN FOR
LODGE LEADERSHIP
SUCCESSION

LODGE REVENUE
PLANNING GUIDE

GUIDE TO LODGE
CULTURE AND
IDENTITY

LODGE GUIDE TO
MAKING MASONS

FROM LEADER TO
MENTOR TRAINING

INSPECTORS' GUIDE TO
SUPPORTING LODGES

SECRETARY &
TREASURER GUIDE TO
JOB OPTIMIZATION

INSPECTOR TEACHING
STRATEGIES

OFFICERS' COACH JOB
DESCRIPTION

The Bottom Line Are we developing stronger leaders? Yes. According to survey data, retreat attendees consistently report increased understanding of four key elements of lodge leadership.



Lodge leaders at the Secretary and Treasurers retreat in early 2020.



E. New Lodges Accelerate Change and Expand the Fraternity's Reach

Problem

The fraternity has no presence in many areas.

Solution

Charter new lodges in high-demand areas to better serve communities and give prospects more options.

The desire for new lodges in high-demand areas was clear from the 2015 feedback. By developing and chartering new lodges, the organization can expand the number of people it reaches and provide a more diverse choice of lodges for prospects.

WHAT WE DID

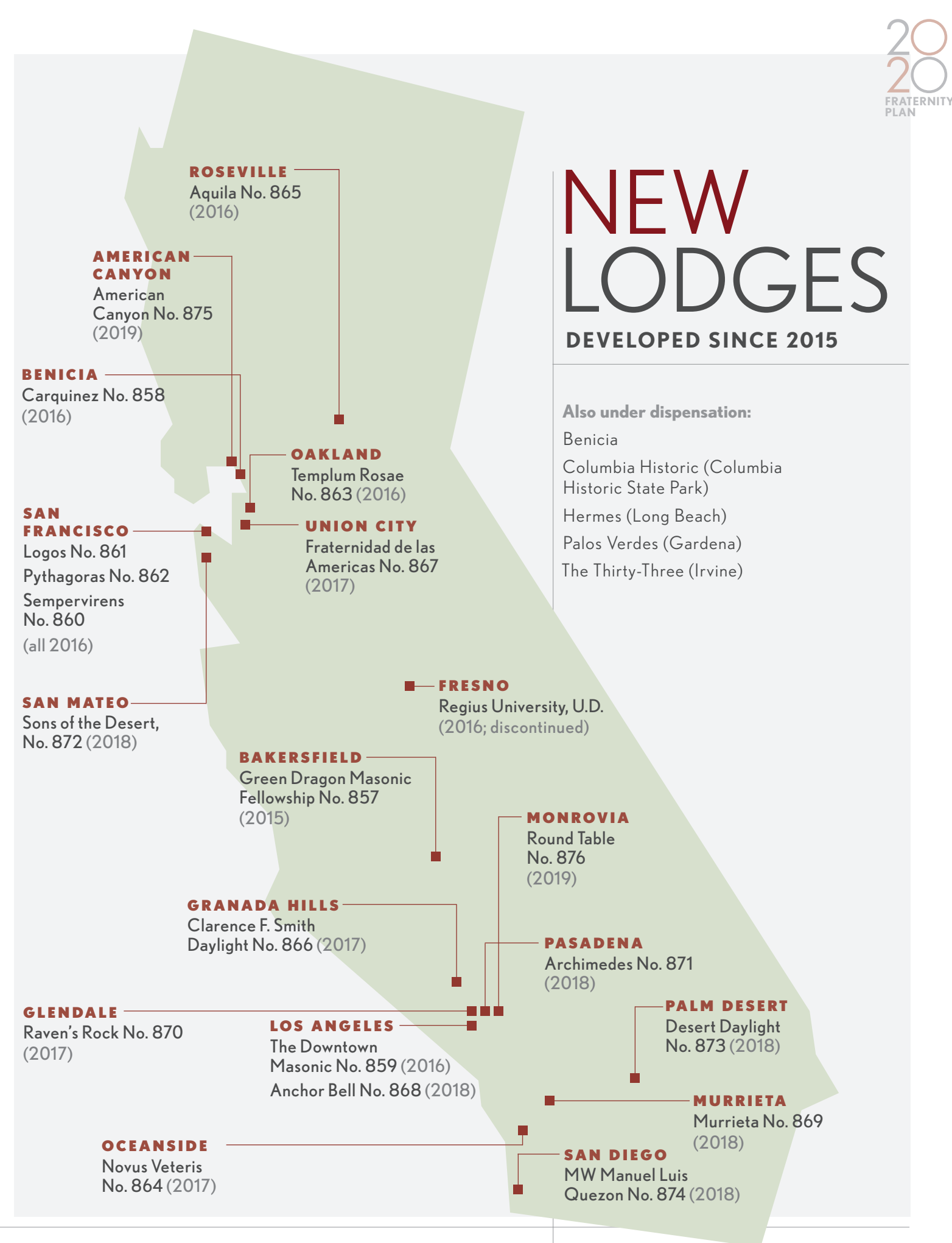
- **Centralized support:** A dedicated New Lodge Development Manager was added to the grand lodge staff in 2017 to help launch new lodges—creating a one-stop

shop for questions and support related to new lodge development.

- **Opened a new hall:** Freemasons' Hall debuted in fall 2019 inside the California Masonic Memorial Temple. The space is currently used by nine lodges, with the capacity to expand to serve even more lodges for degree work or special events.

The Bottom Line

Have new lodges expanded the fraternity's reach? Definitely. Since 2015, we've constituted 20 new lodges. Another six have been instituted (with one being discontinued); and four more have had dispensations approved and should be instituted in the next year. Statewide, Masons now live an average of seven miles from their lodge—the closest in years.



MEANINGFUL AND MEMORABLE DEGREES

The ritual experience is the fraternity's most cherished custom.

ITS TEACHINGS TRANSFORM members' lives. By promoting and sharing the lessons of this tradition, we position the fraternity as an important and relevant part of men's lives; by strengthening the ritual, the fraternity elevates itself compared with other membership and service organizations.

IN THIS SECTION

- A. High-quality curricula
- B. Masonic education
- C. Candidates' ritual experience



Edwin Senga, a 2016 Ritual Award winner and past master of Atwater Larchmont Tila Pass No. 614.

A. High-Quality Ritual Keeps Candidates Engaged

Problem

Candidates can feel overwhelmed; those who couldn't master the ritual turned away from the craft.

Solution

Develop more opportunities for candidate learning and make them easier to access.

Candidates with robust ritual training opportunities are more likely to be engaged and to progress through the degrees. To help new members understand the process, the lessons, and the organization, members say they needed more training content—and at lower cost.

WHAT WE DID

- **Took training digital:** In 2017, the Candidate Learning Center was relaunched on freemason.org as a free service; the first degree lectures were

posted online as slides. Meanwhile, candidates' progress through the degrees began to be tracked on their member records, providing greater transparency for lodge and fraternity leaders.

- **Stayed up-to-date:** Thoughtful updates to the ritual ensures its continued relevance.

The Bottom Line

Are Masons taking the degrees?

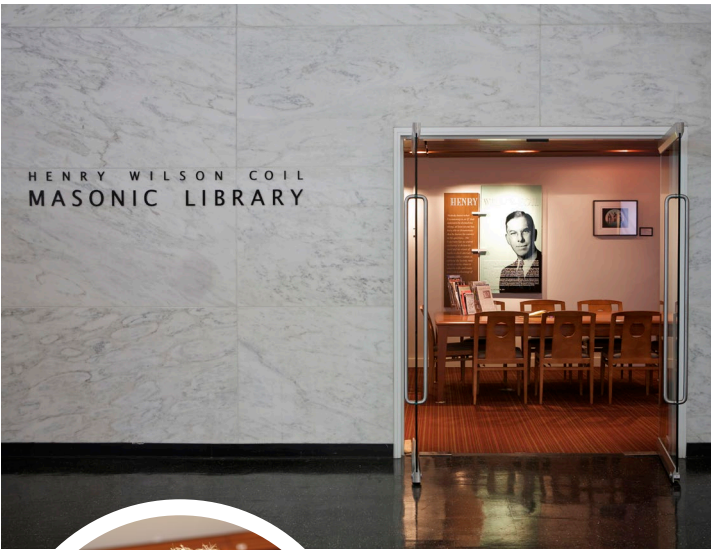
Between 2016 and 2019, some 2,026 applicants have taken all three degrees. Of those, 92 percent remain in good standing—an enormous jump from previous years. Further, in 2019, a record 1,800 members, representing 80 percent of all California lodges, completed at least one course on the Candidate Learning Center.

B. Masonic Education Opportunities Deepen the Member Experience

Problem Members want more Masonic education.

Solution Provide a range of resources for members of all levels.

Members crave high-quality Masonic education that not all lodges can easily provide. Based on feedback, creating and distributing such content and expanding existing programs can deepen members' lifelong connection to the fraternity.

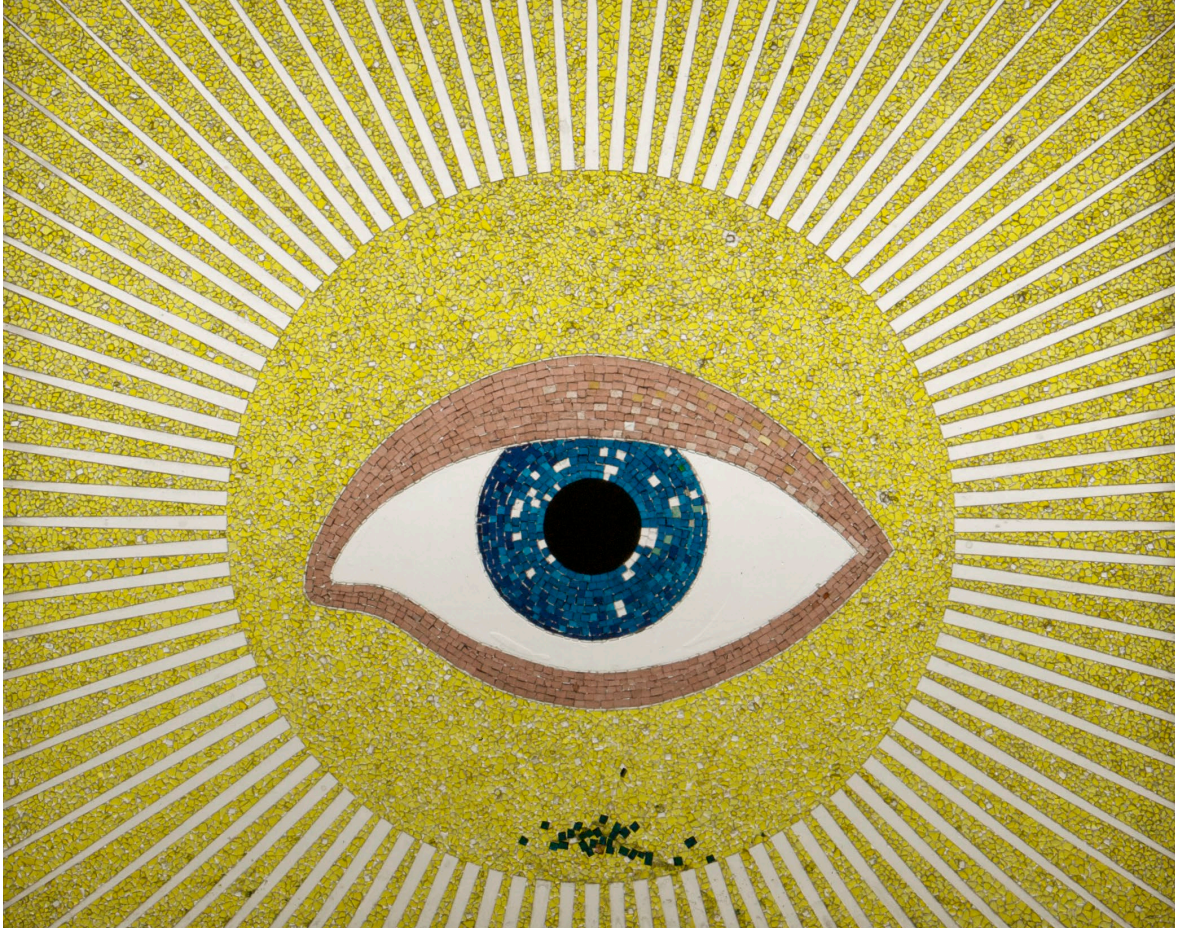
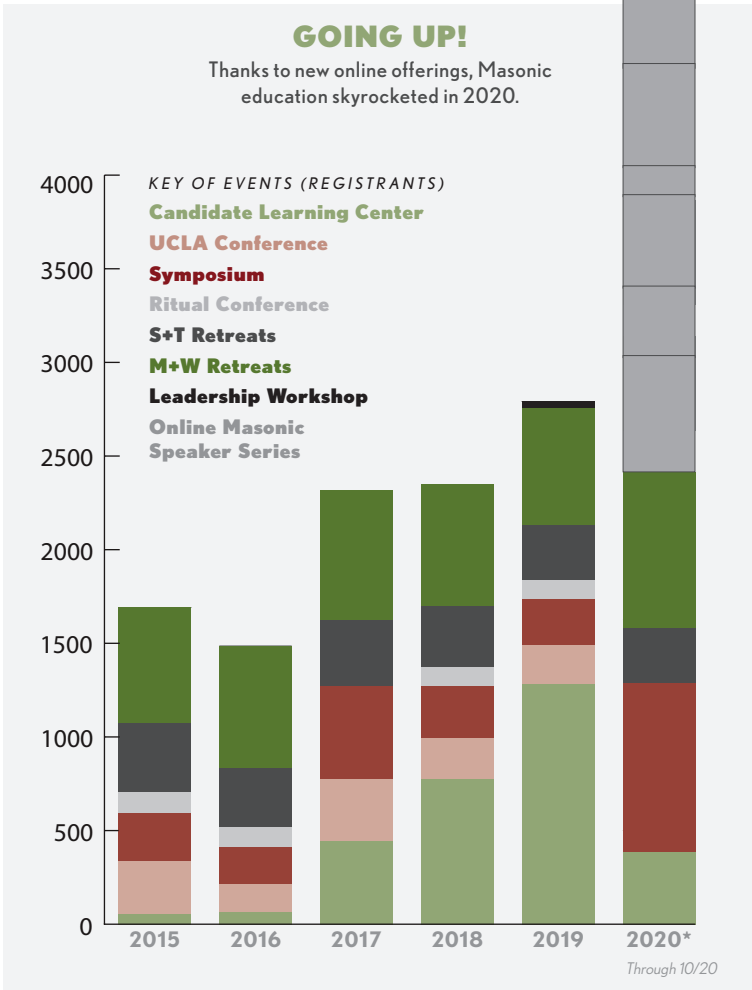


Above: The Henry Wilson Coil Masonic Library inside the California Masonic Memorial Temple in San Francisco.
Left: French historian and Freemasonry expert Pierre Mollier, a speaker at the 2017 California Symposium on Freemasonry.

WHAT WE DID

- **Expanded educational opportunities:** The Masonic Education Committee added a speakers' bureau roster to iMember to connect lodges with potential guests. Grand Lodge continued to support the UCLA International Conference on Freemasonry and the annual symposia in San Francisco and Long Beach.
- **Brought education online:** Beginning in 2020, the Online Masonic Speaker Series brought distinguished speakers to California Masons virtually and free of charge. More than 12,000 Masons registered for one of the first 15 events.

The Bottom Line Are members getting the opportunities they need for Masonic education? Yes. Thanks to online options like the Candidate Learning Center and the Online Masonic Speaker Series, attendance has grown exponentially.



C. Better Ritual Makes Better Masons

Problem Members want a more profound ritual experience.

Solution Ensure members and officers receive adequate ritual training.

Lodge and fraternity leaders can deepen the transformative power of the ritual, making Masons more engaged with one another and their lodge. The Ritual Committee is in an important position to ensure that the ritual is being periodically updated, that lodges are armed with the materials they need to perform the ritual to its best, and that relevant content is available to help deepen the experience and capture the profound nature of the ritual.

WHAT WE DID

- **Made mentors:** The Ritual Committee launched an officers'-coach training program and corresponding Gold Card for completion of all its modules, to develop strong ritualists within every California lodge.

- **Celebrated great ritualists:** Ritual Awards for individuals and teams were given as a vehicle to demonstrate excellence in the craft and promote pride within lodges.
- **Stayed relevant:** The Ritual Committee has provided regular updates to the installation ceremony, including translation into Spanish, and continues to renew and update the Cipher Supplement and Book of Ceremonies as needed.

The Bottom Line Is the ritual still a meaningful part of members' experience? Based on feedback, yes. In surveys of our membership, the ritual is consistently ranked as one of the most important parts of Freemasonry—and what differentiates it from other membership service organizations. While it's difficult to track whether the ritual is more or less meaningful to members than it has been in the past, applications to the Ritual Awards have risen year over year.

THE BIG THREE

Lodge leaders indicated that members identified most strongly with fellowship, followed by ritual and then service.

65%
FELLOWSHIP

25%
RITUAL

10%
SERVICE

POSITIVE IMPACT ON SOCIETY

Masonic values guide us to make a meaningful impact on society.

THAT HAPPENS AT SEVERAL LEVELS of the organization: in individual lodges and their surrounding communities, through the California Masonic Foundation, and through various Masonic relief services. Giving members an opportunity to make a meaningful difference through volunteerism and philanthropy deepens their connection to the fraternity, raises awareness of the Masons of California and its charities, and improves the world around us. Focusing on ways to make the most of the Foundation's charitable dollars emerged as a key priority.

IN THIS SECTION

- A. Culture of philanthropy
- B. Recognition boosts pride



A. Developing a Culture of Philanthropy Sparks Participation

Problem

Members crave a meaningful way to give back to their communities both locally and statewide.

Solution

Simplify the Foundation strategy and create a single fundraising campaign to maximize the giving power of the fraternity.

Members want opportunities to make a difference in their communities. Let's Write the Future has given them that. The landmark three-year fundraising campaign simplified the fraternity's charitable approach to two key initiatives: expanding services through the Masonic Homes of California and promoting childhood literacy in partnership with Raising A Reader. By any measure, it has been our most successful fundraising campaign ever, and beyond the numbers, it has helped establish a culture of giving and provided opportunities for Masons to demonstrate leadership.

CONNECTING TO THE CAUSE



Members' feelings of connection to Masonic charitable partners and initiatives.

WHAT WE DID

- **Gave at record levels:** The Let's Write the Future campaign, supporting childhood literacy in low-performing public schools and skilled nursing and memory care through the Masonic Homes of California in Covina, raised \$7,267,726 through Sept. 30, 2020, our best multiyear campaign ever.
- **Helped a brother out:** In 2020, launched the Distressed Worthy Brother Relief Fund to support those affected by COVID-19, raising more than half a million dollars in the first five months, including record giving from first-time donors.
- **Donated more gloves than ever:** The Masons4Mitts baseball mitt drive expanded in 2015 to include the three Southern California Major League teams. Now in its 12th year, M4M donated more than \$1.2 million to youth initiatives.
- **Went digital:** Launched online platforms for members to give online.
- **Closed out the campaign:** Focused on estate planning and other forms of giving as the final phase of Let's Write the Future.

The Bottom Line

Are California Masons making an impact on society? Undeniably.

Through the California Masonic Foundation, members are expanding opportunities and resources for the most vulnerable people in our communities.

ANATOMY OF A CAMPAIGN

Let's Write the Future, by the numbers

LET'S WRITE THE FUTURE

\$7,267,726
raised through 9/30/20

6,232
individual donors
to the campaign

\$5,000,000
original fundraising
goal

41%
of donations given
through new
online platform

\$3,462,005
donated by
41 Pace Setter lodges

25%
of gifts from
first-time donors

\$2,471,027
given to Raising A Reader,
now in 675 classrooms
statewide

\$271.21
largest average
gift in fraternity
history



Renderings
of the Memory
Care and Skilled
Nursing facility
in Covina.



Raising A
Reader students
in Riverside
County.



Oceanside-
San Dieguito
No. 381, a proud
Pace Setter
lodge.



Residents at
the Masonic
Home in Union
City.

B. Recognition Boosts Pride

Problem Much of the charity work Masons do goes uncredited, so communities remain unaware of its initiatives.

Solution Increase exposure of the Foundation and other charitable efforts to raise the fraternity's profile.

Members want to see the fraternity's good work recognized. Since the adoption of the 2020 Fraternity Plan, the organization has prioritized getting the word out—both within the fraternity and to the world at large—about the good works already being done in lodges.

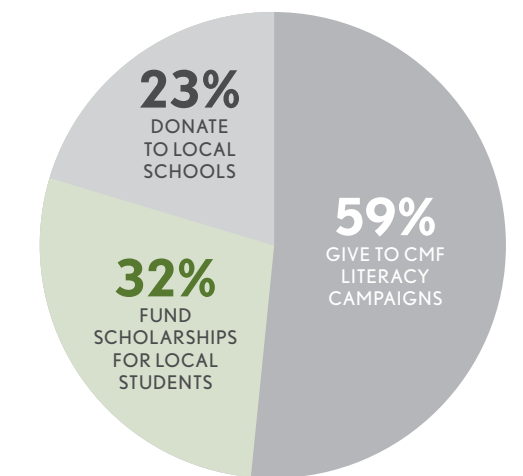
WHAT WE DID

- **Got more visible:** Launched new websites for the Masonic Homes of California, the California Masonic Foundation, and *California Freemason* magazine, providing new channels for stories highlighting fraternity giving.
- **Developed content:** Created award-winning mixed-media publicity and marketing campaigns for the California Masonic Foundation, the Masonic Homes of California, and other entities to promote charitable initiatives.
- **Went social:** In 2019, launched the #bluelodgechallenge Facebook campaign to raise awareness of lodge volunteerism, and in 2020 started weekly 9 O'Clock Toasts on Facebook Live.
- **Sought publicity:** Expanded paid publicity campaigns for MHC services through the *Tri-City Voice* newspaper, *West Coast* magazine, *Psychology Today*, and others.

The Bottom Line Are more people learning about the fraternity's charitable efforts? Through social media, online channels, and paid advertising, examples of lodge and fraternity charity programs are far more visible than they were in 2015. Highlighting and promoting member, lodge, and fraternity-wide giving programs remains a key priority into the next decade.

MASONS GIVE BACK

Masons give locally, too. For instance, when it comes to supporting education, more than half of our lodges donate to the fraternity's statewide literacy campaign. But a third also fund scholarships for local students. And nearly a quarter raise money for schools in their area.



TELLING STORIES

The "Make a Profound Difference" video, available on freemason.org, is the most widely viewed video in the organization's history, with more than 300,000 views via Facebook and YouTube. The video also won a bronze award at the 2018 Association Media and Publishing Awards.

STRONG LODGES AND HALLS

Strong, financially stable lodges are vital to the fraternity's overall health.

BY CENTRALIZING financial and support services, the burden of administrative work for maintaining lodges and halls is removed, freeing members to focus on the fraternal experience. Based on member feedback, tasks that are performed by more than 100 members that are not high-value interpersonal activities should be centralized by Grand Lodge staff.

IN THIS SECTION

- A. Centralizing dues processing
- B. Providing financial services
- C. Keeping member records
- D. Minimizing lodges' risk
- E. Strengthening halls
- F. Ensuring fairness
- G. Investing wisely

A. Centralizing Payments Helps Retain Members

Problem

Suspensions for nonpayment of dues remains the greatest cause for membership loss.

Solution

Simplify and centralize dues-processing systems so it's easier for members to stay up-to-date.

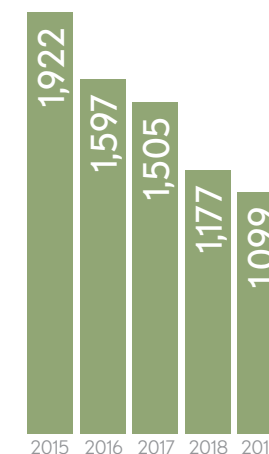
Managing member dues is one of the most time-consuming elements of lodge leadership, with little payoff for maximizing fellowship. By taking this burden off them, Grand Lodge can create efficiencies, help reduce suspensions for nonpayment of dues, and retain members.

WHAT WE DID

- **Automated dues:** Launched a pilot program for a dues-processing system to 30 lodges. The system invoices members, collects payments, updates records, and sends monthly checks and rosters of updated payments to lodges. Four-fifths of members using the pilot program system paid their dues by Q1, compared with 70 percent statewide.
- **Rolled out iMember 2.0:** The new system, introduced in July 2020, integrates the monthly dues-processing framework.
- **Reached out:** Began sending the Grand Lodge Membership Retention Committee a roster of delinquent members and talking points for reaching out to them and getting them paid up.
- **Went digital:** New electronic dues cards are now accessible and can be printed out via iMember.

The Bottom Line

Is the fraternity suspending fewer members? Yes. A total of 43% fewer members were suspended in 2019 than in 2015.



GOING DOWN

Suspensions for nonpayment of dues have fallen dramatically since 2015.

B. Provide Professional Financial Services

Problem

Lodges were losing tax exempt status.

Solution

Centralize bookkeeping and tax services to simplify and professionalize tax preparation.

Lodges and halls needed help with accounting and tax services, as some were out of compliance with government agencies. In response, Grand Lodge launched a suite of specialized financial services.

WHAT WE DID

- **Provided new systems:** Offered a centralized tax and bookkeeping system, Intacct, for lodges and halls through Grand Lodge, along with online and in-person support.
- **Expanded services:** Grand Lodge began handling lodges' quarterly and annual payroll reporting, including W-2s.
- **Got trained:** Lodges received Intacct training at retreats, at regional training sites, and through online video tutorials.
- **Increased outreach:** Through training and outreach, aimed to reach 50-60 percent Intacct usage for halls.

The Bottom Line

Are more lodges and halls in tax compliance? Yes. Since launching Intacct, 41 state and 39 federal exemptions have been restored for lodges; 53 exemptions have been restored for halls, with another 47 in process, saving millions of dollars in taxes.



LODGES

85% using tax services
75% using accounting
29% using payroll



HALLS

50% using accounting
41% using tax services
10% using payroll

C. Updated Records Help Members Stay Engaged

Problem Members' records are often out-of-date, making it harder to stay in touch.

Solution Develop and launch a refreshed Member Center.

Keeping accurate data about our members and their families is important for delivering an excellent membership experience and all of the benefits that includes. Feedback indicated that our aging system needed updating.

WHAT WE DID

- **Rolled out iMember 2.0:** The new platform was introduced July 1, 2020, with online and in-person training offered in advance. Members and staff determined that the following features were key:

ONLINE PAYMENTS	UPDATING MEMBER INFO
IMPROVED COMMUNICATION TOOLS, INCLUDING EMAIL, TEXT, AND ROBOCALLING	EASY INTEGRATION WITH EXISTING MEMBER CENTER, INTACCT, AND MOBILE LODGE APP
MOBILE-FRIENDLY, INCLUDING SELF-SERVICE OPTIONS FOR	UPDATED HALL ASSOCIATION DIRECTOR DATA

The Bottom Line Is iMember 2.0 making a difference? It's too early to tell; however, in the first three months since it launched, 4,051 members had accessed the new system, or slightly under 10 percent—well ahead of the adoption rates for similar programs in other Masonic jurisdictions.



HELP CENTER

Referral calls to Grand Lodge Real Estate services, 2018–2020.

D. Minimizing Lodge Risk Creates Stability

Problem Lodges often lack financial, legal, and real estate expertise.

Solution Offer centralized services.

By utilizing risk-management resources, lodges and halls are better positioned to stay in compliance with local and state regulations—and provide transparency for all.

WHAT WE DID

- **Enhanced risk training:** Grand Lodge bolstered its training offerings on the legal, governance, insurance, and compliance issues faced by halls and lodges, and worked closely with them to identify risk-management professionals to help mitigate or resolve risk issues.
- **Promote real estate services:** Grand Lodge also introduced professional real estate services offered in-house to help lodges and halls manage their portfolios.

The Bottom Line Are lodges in better tax compliance? Yes. Between 2014 and 2018, more than \$2.25 million in taxes, penalties, and interest assessments have been waived by the IRS and FTB as lodges and halls have become current with compliance filings. No assessments have been made in 2019 or 2020.



Members of Palm Springs Lodge No. 693 outside their Masonic hall.

E. Strong Halls Boost Lodges

Problem Masonic halls aren't always uniformly well-managed.

Solution Provide centralized real estate supports to hall administrations.

Halls can be an enormous resource to lodges—or an enormous burden. In many cases, Masonic halls, especially those in disrepair, consumed all the energy of their hall association members. It became apparent that hall associations members required support in managing their real estate portfolios in order to avoid burnout and focus on other areas of concern while still ensuring appropriate compliance and insurance coverage.

WHAT WE DID

- **Provided oversight:** The Grand Lodge Real Estate team continued to provide lodges and hall associations assistance

with their Real Estate Transaction Applications to the Masonic Properties Committee. In 2018, 20 such applications were approved; in 2019, 28 were. Another 28 were approved in 2020 (through Oct. 1).

- **Offered consultation:** Grand Lodge developed a suite of services for hall associations, including help with:

PROPERTY ACQUISITIONS AND DISPOSITIONS (WHICH REQUIRE MASONIC PROPERTIES COMMITTEE APPROVAL)	LONG-TERM CAPITAL PLANNING
LEASES	EMERGENCY RESPONSE, FIRE, AND LIFE SAFETY
ENERGY AND UTILITY MANAGEMENT, INCLUDING SOLAR PROJECTS	COMPLIANCE REPORTING
OPERATIONS AND MAINTENANCE PROJECTS	INSURANCE COVERAGE
	PROPERTY ENCUMBRANCE

The Bottom Line Are Masonic halls better insured than in the past? Definitely yes. Halls today are better ensured than ever. In all, 249 out of 275 Masonic halls in California, or 90 percent, participate in the Grand Lodge Voluntary Halls Insurance program, providing property, liability, crime, D&O, non-owned auto, and umbrella insurance. And for halls that participate in the Marsh Insurance program, there is now a tenant user liability policy, or TULIP, program, available for single-user tenants to purchase prior to accessing the building.

F. Investing Lodge Resources Wisely Brings Peace of Mind

Problem Lodges need confidence that their assets are being professionally managed.

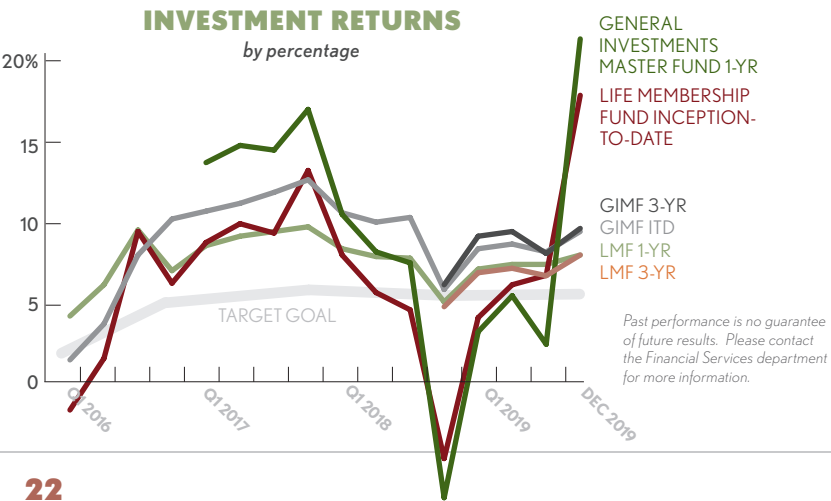
Solution Offer a suite of investment options for lodges and halls.

Many lodges have assets invested in the stock market. Providing them with professional help managing those investments gives members confidence that stewardship of the lodge’s future is in good hands.

WHAT WE DID

- **Centralized and grew:** Promoted two Grand Lodge-managed investment programs: the Life Membership Investment Program and the General Investment Program, both of which help lodges diversify investments, with low fees.

The Bottom Line Are lodges financially secure? As of 2020, some 53 lodges utilize the Life Membership Investment Program, with assets totaling \$2.25 million; an additional 22 lodges participate in the General Investment Program, totaling \$11.86 million. Over the past 10–15 years, these lodges have enjoyed the long-term returns of the Grand Lodge Master Trust, with a rate of 6 to 7 percent.



G. Ensuring Fairness and Building Trust

Problem Masonic trials are time-consuming and demoralizing.

Solution Speed up and standardize trials.

Masonic trials are hard on everyone. By streamlining the process, ensuring fairness and transparency, and encouraging mediation, the fraternity can help alleviate the administrative and emotional strain associated with trials for members, lodges, and the Jurisprudence and Trial Review committees.

WHAT WE DID

- **Offered mediation:** Beginning in 2019, began developing a process and other materials necessary to refer cases to pretrial mediation, potentially alleviating the scheduling burden of trials and offering those involved faster resolution.
- **Standardized trials:** Created a uniform manual for trial masters.
- **Reviewed initiates:** Instituted consistent background checks to screen applicants.
- **Acted transparently:** Implemented new procedures for responding to trial records requests and eliminated duplicative reviews of automatic expulsions.

The Bottom Line Have Masonic trials become easier to resolve? Certainly. Since beginning mediation services in 2019, half of Masonic trial cases have gone that route. Pre-trial mediation resolves matters more quickly, involves fewer people, exhausts fewer resources, and has less impact on lodge harmony.

FAIRNESS FOR ALL

Masonic trials by year. Mediation services were introduced in late 2019, with six referred to pretrial mediation so far in 2020.

