**WHY CREATE iMEMBER 2.0**

**An international collaboration**

In January 2020 we partnered with GrandView, an international Masonic membership relationship database company, to produce iMember 2.0 as a successor to our 16-year old home grown product.   One of the major benefits of using GrandView as the platform is that we are now part of an international Masonic collaboration on membership engagement and data. There are currently 40 jurisdictions worldwide on GrandView with 6,118 Lodges representing 533,035 members.

**The evolution of technology**

The Member Center and iMember 1.0 were cutting edge technology when they were unveiled in 2004 – and were the unsurpassed standard for masonic membership databases and engagement tools for more than a decade. However, as technology evolved, our use of the technology and demands from it expanded. We began engaging our members with a standalone app produced by GroupAhead, which was sunsetted this past summer. We provide financial solutions to lodges through Intacct, however the Member Center and iMember 1.0 were unable to share information from Intacct back into our database. For these reasons, and more, we sought a platform that could move the organization forward with our membership database and provide greater tools for engagement with our members – and with those around the world.

**The introduction of iMember 2.0**

iMember 2.0 went live on July 1, 2020 after making the beta site available to all members from January 30, 2020 when it was introduced at the Secretary and Treasurers Retreats. Trainings from those times are all archived and accessible to all members on the seminars tab from their portal. New trainings are planned and will be added to this growing resource.

**KEY FEATURES ROLLED OUT THIS QUARTER**

**Fully responsive design**

iMember 2.0 is a fully responsive website, that works on desktop computers, laptops, tablets and mobile phones. On tablets and mobile phones the app version of the site can be downloaded by visiting and logging into [www.freemason.org](http://www.freemason.org) from your smart device, which will prompt you to download the app.

**The member profile**

From the profile tile on the iMember 2.0 portal members have a full view into their own member record, where they can update their address and other contact information. Additionally, members can add photos of themselves, include military service, and membership in other Masonic organizations.

**Resources**

From the resources tile members can find all of the resources that were distributed across the previous Member Center. These have been sorted and arranged based on their most common usage.

**The Social Feed**

The most popular feature of iMember 2.0 is the social feed, accessed from the Feed tile on the iMember 2.0 portal. Here members can engage with their Lodge in sharing happenings of the lodge, their favorite masonic article, or other personal quips.

**Integrated lodge calendar**

Connected with the social feed, the lodge calendar is accessed through the events tile of iMember 2.0. Should a member belong to more than one lodge, as with the social feed, all lodges will appear in this custom event calendar.

**Virtual dues card**

Accessed through the virtual card tile, all members now have access to a virtual dues card which is accepted in all lodges across California and around the world. To verify your membership, the QR code on your virtual card can be read by any smart phone camera. If members would like a physical dues card they may print one off from this page. Lodge secretaries continue to have the ability to print dues cards for those who would prefer one.

**Lodge leader dashboards**

For the first time all elected Lodge leaders have access to a specific dashboard that shows all members of the Lodge by membership status, and have views into membership engagement, balance due, and can add to the Lodge vault.

**Lodge methods of communication**

iMember 2.0 features five key methods of communication and engagement with lodge members. Members can also set their own preferences on how they wish to be communicated with, such that Lodge leaders do not need to keep track of various preferences otherwise.

*Social feed.* All members can post to the lodge social feed, but lodge leaders may also post as the lodge to the social feed to help share information. This tool is free to all lodges.

*Email.* iMember 2.0 has a consolidated email tool, which lodge leaders can use to connect with all of their members and remind them about upcoming events, or share other information. This tool is free to all lodges.

*Physical mail.* iMember will generate a PDF for the printing of physical letters for those members who wish to receive communication in this manner. This tool is free to all lodges.

*Text messages*. For the first time, Lodges can easily communicate with members who would prefer to receive text messages about lodge business. This tool is free for one message or robocall to each member of a lodge per month (or twelve contacts a year). After that messages or robocalls are $0.05 a message, billed on your annual per capita statement. Your engagement dashboard shows your message utilization.

*Robocalls*. For the first time, Lodges can easily communicate with members who would prefer to receive robocalls about lodge business, which can even be personalized with different lodge leaders recording the message. This tool is free for one message or robocall to each member of a lodge per month (or twelve contacts a year). After that messages or robocalls are $0.05 a message, billed on your annual per capita statement. Your engagement dashboard shows your robocall utilization.

**UPCOMING FEATURES**

There are **six key developmental objectives** through the end of the year, namely:

**App notifications**

When completed, much like in the GroupAhead apps, when a member posts to a social feed, members of that social feed will be notified. We will also be able to use this feature to alert members to dues payments, upcoming events, and other similar items.

**Google calendar integration**

Originally a feature planed for launch, integration with the native calendar in iMember 2.0 to be able to push to Google calendars, which many Lodges use to feed their websites, has been delayed due to Google updating the process by which they approve third party services pushing data. We are awaiting the specifications for this new relationship and will build the necessary coding infrastructure when provided.

**Dues payments**

For the first time we are providing a central location for all members to pay their 2021 dues, either by check or credit card. Following the close of the annual communication we will send, both by physical mail and electronic mail, dues invoices to all members. If a member belongs to more than one California Lodge, this dues notice will reflect their total amount due. The member will be directed to iMember 2.0 to make payment by credit card or to send a check to the Grand Lodge office. Member records will be updated, and their virtual dues card will be automatically updated and available to them. Reminders will be sent in mid-November and January, and Lodges will receive monthly checks and reporting on payments.

**Intacct integration**

With the dues payments portal, we will have the ability for payments received in iMember to update intacct and have two-way communication between the systems in a way that we have not, heretofore, been able to do.

**Bulk mailing labels**

While bulk mailing labels were built for all members, we have set a development objective for these to include widows and others subscribed to the lodge's mailings.

**Member search feature**

Available through the member search tile on the iMember 2.0 portal, there has been some complications for advanced users of the product who are unable to find members due to the requirement of a first name and last name. This is being reworked to permit any combination thereof to work in searching for a member.

**USAGE STATISTICS**

**Total registered users**

4,051 (9.65% of California Masons)

*GrandView, the developers of iMember 2.0, has anecdotally indicated that we have far exceeded any other Grand Lodge in registrants and utilization for this point in our roll out.*

**Average daily portal views**

352 portal views

*The portal is viewable to all members*

**Average daily dashboard views**

190 dashboard views

89% of lodges have accessed the lodge dashboard in the last 30 days

*The dashboard is viewable to the Master, Warden, Treasurer, and Secretary.*

*Inspectors and AGLs also have dedicated portals and can see the same view as lodge leaders*

**Social feed posts**

Nearly 5,000 social feed posts have been made in the past month by members to lodges, committees and other social groups.

**Member services cases**

More than 1,500 member services cases have been received on iMember 2.0, most answered in the same day – and most looking for where a feature or document can be found on the new site.

**FUTURE REPORTING AND INSIGHTS**

A similar report to this will be issued in following the quarters ending December 31, 2020, March 31 and June 30, 2021 reviewing the key features that were rolled out in that quarter, upcoming features and major statistics on the use of iMember 2.0 to date.

Members continue to provide essential suggestions for how the product can evolve and best meet their needs and we are excited to see how the quarterly report may inspire new suggestions and help us improve the product even more.

**ACCESS, SUPPORT AND TRAINING**

**Access**

iMember 2.0 is accessed by logging into the “For Members” area of <http://www.freemason.org>. For members who have not yet registered, click on member registration where you will be asked for your Lodge number, member ID (found on your dues card) and your last name. If you belong to more than one California lodge, you only need to register once.

**Support**

Member Services is available to assist members in accessing, navigating and taking suggestions for iMember 2.0. You can reach them at (415) 292-9180 or by email at memberservices@freemason.org.

**Training**

   Trainings from courses offered from January 30, 2020 to today are all archived and accessible to all members on the seminars tile from the iMember 2.0 portal. New trainings are planned and will be added to this growing resource.