



Prospect Manager Association Meeting June 27, 2023

memberservices@freemason.org



(415) 292-9180



Agenda

#ImAMason campaign taking place 1st two weeks of July

With Emily Limón, Chief Communications Officer

Prospect Manager Training

With Michael Roberts, Manager of Membership and Lodge Development

Monthly Prospect Surveys

With Michael Roberts, Manager of Membership and Lodge Development

**Next semi-annual Prospect Manager Association Webcast is
January 30, 2024 @ 6 PM**

#ImAMason Campaign

**With Emily Limón
Chief Communications Officer**

Introduction to Prospect Manager Training

**With Jordan Yelinek
Assistant Grand Secretary**

Membership Year 2022-2023

as of May 25, 2023

	July	August	September	October	November	December	January	February	March	April	May	June	Total	Avg. months to status	
NEW PROSPECTS															
New Prospects	623	1030	750	325	341	377	370	292	325	317	263	0	5013		
Web Inquiry	623	1030	750	325	341	377	370	292	323	275	224	0	4930		98%
Added by Lodge	0	0	0	0	0	0	0	0	2	42	39	0	83		2%
Referred to other Grand Lodge	54	16	10	10	106	118	34	65	86	106	62	0	667		13%
California Prospects	569	1014	740	315	235	259	336	227	239	211	201	0	4346		87%
CURRENT STATUS															
Prospect	273	533	369	102	130	154	193	156	175	153	178	0	2416		56%
Applicant	6	23	8	10	4	16	19	12	10	10	6	0	124	3.7	7%
Entered Apprentice	24	19	24	14	18	10	9	14	4	1	0	0	137	3.2	
Fellowcraft	4	4	8	7	1	2	2	1	0	0	0	0	29	3.0	
Master Mason	4	2	2	0	0	0	0	0	0	0	0	0	8	4.5	
Inactive	258	433	329	182	82	77	113	44	50	47	17	0	1632		38%

Prospect Manager Training

With Michael Roberts

Manager of Membership and Lodge Development

What is a Prospect Manager

- Appointed Committee Chair
- Manages all “Inquiries” on Lodge Admin Dashboard
- Acknowledges Prospect with warm introduction and welcome message
- Maintains frequent communication with prospect
- Provides monthly prospect reports to lodge Executive Committee.
- Leads effort to convert from Inquiry to Applicant.
- If Prospect remains “unresponsive” remove from Lodge Admin Dashboard.

How to Add a Prospect Manager



Masons of California

[My Portal](#)

[Dashboard](#)

[Help Desk](#)

[Lodges](#)

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Martinez No. 41 - Admin Dashboard

Active

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[Spouses/Widows](#)

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[Engagement](#)

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[Notes](#)

[GL Member Search](#)

[Lodge Admins](#)

Members Add

11 - Intent to SNPD

[> Download EXCEL Report](#)

[> Send Dues Notice Emails](#)

Name	Member #	Intent to SNPD	Balance	
Annis, David Courtney	8922	05/04/2023	-\$419.00	Apply Payment
Chinlakov, Ulian Ivanovov	344565	05/04/2023	-\$419.00	Apply Payment
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Richards, Rick Glenn	8847	05/04/2023	-\$419.00	Apply Payment
Schuler, Matthew Frederick	193923	05/04/2023	-\$419.00	Apply Payment
Thompson, Andrew Travis	381668	05/04/2023	-\$470.50	Apply Payment

4 - Inquiries

Name	Member #	Inquired	Last Activity

Search Lodge Members



GL Posts

May Secretary's Association Meeting

04/04/2023

2023 dues

11/10/2022

2023 Secretary's Association Meeting Survey

11/03/2022

[View All](#)

GL Events

Conejo Valley Festive Board

Jun 20, 2023

5:00 PM - 9:00 PM

Thousand Oaks, CA

10 Attending [View Details / RSVP >](#)

GLEX

Jun 23, 2023

10:00 AM - 2:00 PM



Martinez No. 41 - Admin Dashboard

Active

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Officers [Add / Update](#)



Current Officers

Lodge Office	Member	Term Start	
Worshipful Master	David Wayne Epps	12/03/2022	▼
Senior Warden	William Arthur Wieger, Sr.	12/03/2022	▼
Junior Warden	Forrest Sean Farwell	12/03/2022	▼
Treasurer	Zahid Peoples	12/03/2022	▼
Secretary	Casey Alan Scott	12/03/2022	▼
Chaplain	Michael Scott Williams	12/03/2022	▼
Junior Deacon	Arthur Zaballa Cruz	12/03/2022	▼
Senior Steward	David George Parsons, Sr.	12/03/2022	▼
Junior Steward	Curtis Jon Epps	12/03/2022	▼
Marshal	Caleb Allen Betz	12/03/2022	▼
Tiler	Sean Lee Whiteside	06/01/2023	▼
Prospect Manager	Forrest Sean Farwell	12/03/2022	▼

Elections [Add](#)

06/01/2023

Special Election



GL Posts

May Secretary's Association Meeting

📅 04/04/2023

2023 dues

📅 11/10/2022

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GLEX

📅 Jun 23, 2023

Add Officer

* Term Start (mm-dd-yyyy)

06-27-2023

Term End (mm-dd-yyyy)

mm-dd-yyyy

* Member

359302-Daniel Abad Jr.



* Lodge Office

Worshipful Master



Add Officer

Add Officer

* Term Start (mm-dd-yyyy)

06-27-2023

Term End (mm-dd-yyyy)

12-09-2023

* Member

359302-Daniel Abad Jr.



* Lodge Office

Worshipful Master



Add Officer



Add Officer

* Term Start (mm-dd-yyyy)

06-27-2023

Term End (mm-dd-yyyy)

12-09-2023

* Member

365973-Forrest Farwell



* Lodge Office

Worshipful Master



Add Officer

Add Officer

* Term Start (mm-dd-yyyy)

06-27-2023

Term End (mm-dd-yyyy)

12-09-2023

* Member

365973-Forrest Farwell



* Lodge Office

Prospect Manager



Add Officer



Add Officer

* Term Start (mm-dd-yyyy)

06-27-2023

Term End (mm-dd-yyyy)

12-09-2023

* Member

365973-Forrest Farwell



* Lodge Office

Prospect Manager



Add Officer



Masons
of California

Martinez No. 41 - Admin Dashboard

Active

- Members
- Spouses/Widows
- Dues & Payments
- Engagement
- Officers
- Lodge Settings
- History
- Lodge Committees
- File Vault
- Resources/Forms
- Inactive & Deceased
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- Audit Report
- Notes
- GL Member Search
- Lodge Admins

Officers [Add / Update](#)



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Elections [Add](#)

06/01/2023

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2023 dues

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GLEX

📅 Jun 23, 2023



Martinez No. 41 - Admin Dashboard

Active

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Members [Add](#)



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4 - Inquiries

Name	Member #	Inquired	Last Activity	
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Tumlin Jr., James Lloyd	386813	07/18/2022	12/21/2022	
Cottrell, Jonathan Lee	391337	03/17/2023	04/05/2023	
Blagg, Jeffrey Curtis	388173	08/26/2022	12/21/2022	



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Oxnard/Ventura, CA

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ANACAPA LODGE

Martinez No. 41 - Admin Dashboard

Active

Members

Spouses/Widows

Dues & Payments

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ANACAPA LODGE

Jeffrey William Guillen – 388914

Inquiry

Personal Info [Update Personal Information](#)

Birth Date

No Data

How can we help?

How did you hear about us? / Inquiry Source

I have known several people who were Masons or had family members who were Masons.

Reason for Interest

I am interested in being part of a group, outside of church, that supports and has ties to the community.

Have you ever been convicted of felony?

Campaign

Print Member Profile

Actions

By Lodge

By Grand Lodge/District

Re-assign District

Re-Assign Lodge

Received by Lodge Martinez No. 41 (12-19-2022
09:57AM)

Petition

Already a member

Lost Contact

No Longer Interested

Not Worthy / Didn't Meet
ExpectationsNot Qualified / Failed
Background Check

Fees / Dues Cost Issue

Moving Out of State

Time Commitment Issue

Other Reasons for
Termination

Delete

Contact Information [Update Contact Info](#)

Preferred Contact Method Not Set

(925) 595-1928 Mobile

600 J Street
Martinez, CA 94553

[Directions](#)jguillen42077@yahoo.com

Last updated on: 22 September, 2022 @ 07:22AM

Historical Events [Add History Event](#)

Event Type	Date	Lodge		
Web Inquiry	09/22/2022	Martinez No. 41	Edit	Checkmark

Memberships | [Change Home Lodge](#) | [Add Membership](#)

Lodge	Status	Membership Class	Actions	Balance
Martinez No.41	(Home Lodge)		Search Edit	\$0.00



Jeffrey William Guillen – 388914

[Inquiry](#)Personal Info [Update Personal Information](#)

Birth Date

No Data

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Campaign

Print Member Profile

Actions

☐ By Lodge☐ By Grand Lodge/District[Re-assign District](#)[Re-Assign Lodge](#)

Received by Lodge Martinez No. 41 (12-19-2022 09:57AM)

Petition

[Already a member](#)[Lost Contact](#)[No Longer Interested](#)[Not Worthy / Didn't Meet Expectations](#)[Not Qualified / Failed Background Check](#)[Fees / Dues Cost Issue](#)[Moving Out of State](#)[Time Commitment Issue](#)[Other Reasons for Termination](#)[Delete](#)Contact Information [Update Contact Info](#)

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Jeffrey William Guillen – 388914

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Memberships | [Change Home Lodge](#) | [Add Membership](#)

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Jeffrey William Guillen – 388914

[Inquiry](#)Personal Info [Update Personal Information](#)

Birth Date

No Data

How can we help?

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[Print Member Profile](#)

Actions

☒ By Lodge☐ By Grand Lodge/District[Re-assign District](#)[Re-Assign Lodge](#)

Received by Lodge Martinez No. 41 (12-19-2022 09:57AM)

[Petition](#)[Already a member](#)[Lost Contact](#)[No Longer Interested](#)[Not Worthy / Didn't Meet Expectations](#)[Not Qualified / Failed Background Check](#)[Fees / Dues Cost Issue](#)[Moving Out of State](#)[Time Commitment Issue](#)[Other Reasons for Termination](#)[Delete](#)Contact Information [Update Contact Info](#)

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Memberships | [Change Home Lodge](#) | [Add Membership](#)

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Jeffrey William Guillen – 388914

[Inquiry](#)**Personal Info** [Update Personal Information](#)**Birth Date**

No Data

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Memberships | [Change Home Lodge](#) | [Add Membership](#)

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Print Member Profile**Actions**☒ By Lodge☐ By Grand Lodge/District[Re-assign District](#)[Re-Assign Lodge](#)

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Petition[Already a member](#)[Lost Contact](#)[No Longer Interested](#)[Not Worthy / Didn't Meet Expectations](#)[Not Qualified / Failed Background Check](#)[Fees / Dues Cost Issue](#)[Moving Out of State](#)[Time Commitment Issue](#)[Other Reasons for Termination](#)[Delete](#)

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Preferred Contact Method [Not Set](#)

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Memberships [Change Home Lodge](#) | [Add Membership](#)

Lodge	Status	Membership Class	Actions	Balance
Martinez No.41	(Home Lodge)		🔍 ✎	\$0.00

Notes [Add Note](#)

10 October, 2022 @ 01:26PM by casemanager89@yahoo.com

New Prospect Process Notes: Has been contacted by Master

[Delete Note](#)

22 September, 2022 @ 07:22AM by

[Delete Note](#)

Documents [Upload Document](#)

Name	Type	Lodge	Uploaded On	Actions
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No Longer Interested

Not Worthy / Didn't Meet
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Not Qualified / Failed
Background Check

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Other Reasons for
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[Delete](#)

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Memberships [Change Home Lodge](#) | [Add Membership](#)

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Notes [Add Note](#)

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Documents [Upload Document](#)

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Jeffrey William Guillen – 388914

[Inquiry](#)Personal Info [Update Personal Information](#)

Birth Date

No Data

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Print Member Profile

Actions

- ☒
- By Lodge
-
- ☐
- By Grand Lodge/District

[Re-assign District](#)[Re-Assign Lodge](#)

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-
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[Petition](#)[Already a member](#)[Lost Contact](#)[No Longer Interested](#)[Not Worthy / Didn't Meet
Expectations](#)[Not Qualified / Failed
Background Check](#)[Fees / Dues Cost Issue](#)[Moving Out of State](#)[Time Commitment Issue](#)[Other Reasons for
Termination](#)[Delete](#)



Martinez No. 41 → Application

Member: Jeffrey William Guillen #388914

☐ Applicant has signed required release for background check

* Petition Date (mm-dd-yyyy)

06-19-2023

Select the date of the meeting at which the Lodge will take action on this (mm-dd-yyyy).

If you have configured stated meetings in Lodge settings, they will be highlighted in the calendar.

mm-dd-yyyy

Recommenders

- Both recommenders must be currently active CA Masons
- Both recommenders must be members of this Lodge

* First Recommender

Select member

* Second Recommender

Select member



Martinez No. 41 → Application

Member: Jeffrey William Guillen #388914

☒ Applicant has signed required release for background check

* Petition Date (mm-dd-yyyy)

06-27-2023

Select the date of the meeting at which the Lodge will take action on this (mm-dd-yyyy).

If you have configured stated meetings in Lodge settings, they will be highlighted in the calendar.

mm-dd-yyyy

Recommenders

- Both recommenders must be currently active CA Masons
- Both recommenders must be members of this Lodge

* First Recommender

Select member

* Second Recommender

Select member

[Complete Application](#)



Martinez No. 41 → Application

Member: Jeffrey William Guillen #388914

☒ Applicant has signed required release for background check

* Petition Date (mm-dd-yyyy)

06-27-2023

Select the date of the meeting at which the Lodge will take action on this (mm-dd-yyyy).

If you have configured stated meetings in Lodge settings, they will be highlighted in the calendar.

07-11-2023

Recommenders

- Both recommenders must be currently active CA Masons
- Both recommenders must be members of this Lodge

* First Recommender

Select member

* Second Recommender

Select member

Complete Application



Martinez No. 41 → Application

Member: Jeffrey William Guillen #388914

☒ Applicant has signed required release for background check

* Petition Date (mm-dd-yyyy)

06-27-2023

Select the date of the meeting at which the Lodge will take action on this (mm-dd-yyyy).
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07-11-2023

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Select member

* Second Recommender

Select member

Complete Application



Martinez No. 41 → Application

Member: Jeffrey William Guillen #388914

☐ Applicant has signed required release for background check

* Petition Date (mm-dd-yyyy)

06-27-2023

Select the date of the meeting at which the Lodge will take action on this (mm-dd-yyyy).

If you have configured stated meetings in Lodge settings, they will be highlighted in the calendar.

07-11-2023

Recommenders

- Both recommenders must be currently active CA Masons
- Both recommenders must be members of this Lodge

* First Recommender

Donald John Beringer #8891

* Second Recommender

John Scott Parker #164581



Martinez No. 41 ➔ Application

Member: Jeffrey William Guillen #388914

☒ Applicant has signed required release for background check

✳️ Petition Date (mm-dd-yyyy)

06-27-2023

Select the date of the meeting at which the Lodge will take action on this (mm-dd-yyyy).

If you have configured stated meetings in Lodge settings, they will be highlighted in the calendar.

mm-dd-yyyy

Recommenders

- Both recommenders must be currently active CA Masons
- Both recommenders must be members of this Lodge

✳️ First Recommender

Donald John Beringer #8891

✳️ Second Recommender

John Scott Parker #164581

Complete Application

Tylor Douglas Ceresa - 392022

Applicant

General

[Demographics](#)[Photos](#)[Memberships](#)[Life Memberships](#)[Spouse/Partner /
Other Contacts](#)[History](#)[Offices](#)[Preferences](#)[Notes](#)[Documents](#)[Reports](#)Personal Information [Update Personal Information](#)

Masonic Title

Mister

No Photo

[Update Profile Picture](#)

Birth Date

03/20/1996 --> 27.25 Years Old

Occupation

Delivery Driver -

Contact Information [Update Contact Info](#)

Preferred Contact Method Not Set

[\(925\) 890-6761](#) Home[353 Breckenridge Pl](#) [Directions](#) [VERIFIED](#)
Martinez, CA 94553-3502[\(925\) 890-3449](#) Mobile

- > [Mark as Undeliverable](#)
- > [Manually Override Address](#)

Last updated on: **6 May, 2023 @ 11:15AM** by: **Casey Scott (casemanager89@yahoo.com)**

Signature

No Signature

[Update
Signature](#)[Choose File](#) No fil...hosen[Save](#)

Martinez No.41

Active - Regular

Balance

\$0.00

[Status Change](#)

Candidate Coach

[Assign Candidate Coach](#)[Investigation](#)

Jeffrey William Guillen – 388914

[Inquiry](#)Personal Info [Update Personal Information](#)

Birth Date

No Data

How can we help?

How did you hear about us? / Inquiry Source

I have known several people who were Masons or had family members who were Masons.

Reason for Interest

I am interested in being part of a group, outside of church, that supports and has ties to the community.

Have you ever been convicted of felony?

Campaign

Contact Information [Update Contact Info](#)

Preferred Contact Method Not Set

 (925) 595-1928 Mobile 600 J Street
Martinez, CA 94553[Directions](#)  jguillen42077@yahoo.com

Last updated on: 22 September, 2022 @ 07:22AM

Historical Events [Add History Event](#)

Event Type	Date	Lodge		
Web Inquiry	09/22/2022	Martinez No. 41		

Memberships | [Change Home Lodge](#) | [Add Membership](#)

Lodge	Status	Membership Class	Actions	Balance
Martinez No.41	(Home Lodge)		 	\$0.00

Print Member Profile

Actions

- ☒
- By Lodge
-
- ☐
- By Grand Lodge/District

[Re-assign District](#)[Re-Assign Lodge](#)

Received by Lodge Martinez No. 41 (12-19-2022 09:57AM)

[Petition](#)[Already a member](#)[Lost Contact](#)[No Longer Interested](#)[Not Worthy / Didn't Meet Expectations](#)[Not Qualified / Failed Background Check](#)[Fees / Dues Cost Issue](#)[Moving Out of State](#)[Time Commitment Issue](#)[Other Reasons for Termination](#)[Delete](#)

* Comments



Masons
of California

Confirm

Tim Aan't Goor – 389072

Prospect - Inactive

Personal Info [Update Personal Information](#)

Birth Date

No Data

How can we help?

How did you hear about us? / Inquiry Source

Legend

Reason for Interest

Build community

Have you ever been convicted of felony?

Campaign

[Print Member Profile](#)
[Not Interested](#)

Actions

☒ By Lodge

☐ By Grand Lodge/District

Inquiry closed on 04-20-2023 02:01PM

[Mark as Active](#)
[Delete](#)

Contact Information [Update Contact Info](#)

Preferred Contact Method Not Set

📞 (323) 481-8946 Mobile

🏠 80 w Sierra Madre blvd [Directions](#)

✉ timaantgoor@gmail.com

Sierra Madre, CA 91024

Last updated on: 28 September, 2022 @ 08:57PM

Historical Events [Add History Event](#)

Event Type	Date	Lodge		
Web Inquiry	09/28/2022	San Marino No. 408		

How to export Inquires to an excel spreadsheet



Masons of California

[My Portal](#)

[Dashboard](#)

[Help Desk](#)

[Lodges](#)

[Members](#)

[System](#)

[ANCOM](#)

[Sign out](#)

Martinez No. 41 - Admin Dashboard

Active

Members

[Spouses/Widows](#)

[Dues & Payments](#)

[Engagement](#)

[Officers](#)

[Lodge Settings](#)

[History](#)

[Lodge Committees](#)

[File Vault](#)

[Resources/Forms](#)

[Inactive &](#)

[Deceased](#)

[Reports & Labels](#)

[Report Builder](#)

[Annual Returns](#)

[Life Memberships](#)

[Audit Report](#)

[Notes](#)

[GL Member Search](#)

[Lodge Admins](#)

Members [Add](#)

11 - Intent to SNPD

[Download EXCEL Report](#)

[Send Dues Notice Emails](#)

Name	Member #	Intent to SNPD	Balance	
Annis, David Courtney	8922	05/04/2023	-\$419.00	Apply Payment
Chinlakov, Ulian Ivanovov	344565	05/04/2023	-\$419.00	Apply Payment
Flores, Antonio Tuana	192599	05/01/2023	-\$419.00	Apply Payment
Gonzales, Wenceslao Oscar, III	219105	05/04/2023	-\$419.00	Apply Payment
Hermeston, Joshua Clark	334507	05/04/2023	-\$419.00	Apply Payment
Kelnhofer, Robert C.	186650	05/04/2023	-\$419.00	Apply Payment
Lessley, James Robert	342545	05/04/2023	-\$419.00	Apply Payment
Magleby, Thomas Raymond	353682	05/04/2023	-\$419.00	Apply Payment
Richards, Rick Glenn	8847	05/04/2023	-\$419.00	Apply Payment
Schuler, Matthew Frederick	193923	05/04/2023	-\$419.00	Apply Payment
Thompson, Andrew Travis	381668	05/04/2023	-\$470.50	Apply Payment

4 - Inquiries

Name	Member #	Inquired	Last Activity

Search Lodge Members



GL Posts

May Secretary's Association Meeting

04/04/2023

2023 dues

11/10/2022

2023 Secretary's Association Meeting Survey

11/03/2022

[View All](#)

GL Events

Conejo Valley Festive Board

Jun 20, 2023

5:00 PM - 9:00 PM

Thousand Oaks, CA

10 Attending [View Details / RSVP >](#)

GLEX

Jun 23, 2023

10:00 AM - 2:00 PM

How to export Inquires to an excel spreadsheet



Masons of California

[My Portal](#)

[Dashboard](#)

[Help Desk](#)

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Martinez No. 41 - Admin Dashboard

Active

Members

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4 - Inquiries

Name	Member #	Inquired	Last Activity
------	----------	----------	---------------

Search Lodge Members



GL Posts

May Secretary's Association Meeting

04/04/2023

2023 dues

11/10/2022

2023 Secretary's Association Meeting Survey

11/03/2022

[View All](#)

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Conejo Valley Festive Board

Jun 20, 2023

5:00 PM - 9:00 PM

Thousand Oaks, CA

10 Attending [View Details / RSVP >](#)

GLEX

Jun 23, 2023

10:00 AM - 2:00 PM

How to export Inquires to an excel spreadsheet

Building report for: Martinez Lodge

[Back to Lodge](#)

Report Title: Martinez No. 41 06/19/2023 [Edit](#)

Clicking the buttons below will only add members / contacts not currently in queue.

Lodge Members

Inquiry

Add to queue

Lodge Officers

Select Type

Add to queue

Misc Contacts

Select Type

Select Status

Add to queue

Grand Lodge

Current Grand Lodge Officers

Add to queue

District

Select Type

Add to queue

Mailing List

Select Type

Add to queue

Birthday

(* Months select is required)

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July

☐ August ☐ September ☐ October ☐ November ☐ December

Select Birthday Type

Add to queue

Reports & Labels

- > Spreadsheet
- > PDF
- > Avery 5160
- > Avery 5162
- > Avery 5162 (include USPS Intelligent Mail Barcode)
- > #10 Envelope (No Return Address)
- > #10 Envelope (Include Return Address)

Create Distribution List from queue

- > Create Mailing List
- > Create Email List
- > Create SMS List
- > Create Robocall List

Clear Queue

How to export Inquires to an excel spreadsheet

Building report for: Martinez Lodge

[Back to Lodge](#)

Report Title: Martinez No. 41 06/19/2023 [Edit](#)

Clicking the buttons below will only add members / contacts not currently in queue.

Lodge Members

Inquiry

Add to queue

Lodge Officers

Select Type

Add to queue

Misc Contacts

Select Type

Select Status

Add to queue

Grand Lodge

Current Grand Lodge Officers

Add to queue

District

Select Type

Add to queue

Mailing List

Select Type

Add to queue

Birthday

(* Months select is required)

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July

☐ August ☐ September ☐ October ☐ November ☐ December

Select Birthday Type

Add to queue

Reports & Labels

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Create Distribution List from queue

- > Create Mailing List
- > Create Email List
- > Create SMS List
- > Create Robocall List

Clear Queue

How to export Inquires to an excel spreadsheet

4 added to queue.



Building report for: Martinez Lodge

[Back to Lodge](#)

Report Title: Martinez No. 41 06/19/2023

[Edit](#)

Clicking the buttons below will only add members / contacts not currently in queue.

Lodge Members

Select Status



Add to queue

Lodge Officers

Select Type



Add to queue

Misc Contacts

Select Type



Select Status



Add to queue

Grand Lodge

Current Grand Lodge Officers



Add to queue

District

Select Type



Add to queue

Mailing List

Select Type



Add to queue

Birthday

(* Months select is required)

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July

☐ August ☐ September ☐ October ☐ November ☐ December

Select Birthday Type



Add to queue

Reports & Labels

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- > Avery 5162
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- > Create Email List
- > Create SMS List
- > Create Robocall List

Clear Queue

How to export Inquires to an excel spreadsheet

4 added to queue.



Building report for: Martinez Lodge

[Back to Lodge](#)

Report Title: Martinez No. 41 06/19/2023

[Edit](#)

Clicking the buttons below will only add members / contacts not currently in queue.

Lodge Members

Select Status



Add to queue

Lodge Officers

Select Type



Add to queue

Misc Contacts

Select Type



Select Status



Add to queue

Grand Lodge

Current Grand Lodge Officers



Add to queue

District

Select Type



Add to queue

Mailing List

Select Type



Add to queue

Birthday

(* Months select is required)

- ☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July
☐ August ☐ September ☐ October ☐ November ☐ December

Select Birthday Type



Add to queue

Reports & Labels

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> Create Email List

> Create SMS List

> Create Robocall List

Clear Queue

How to export Inquires to an excel spreadsheet

iMember #	First Name	Last Name	Address	City	State	Zip	Email	Mobile Phone	Member
388173	Jeffrey	Blagg	520 arch st	Martinez	CA	94553	Jeffcblagg@gmail.com	(929) 259-5636	Inquiry
391337	Jonathan	Cottrell	816 Little Valley Road	Martinez	CA	94553	jonathancottrell72@gmail.com	(925) 262-6984	Inquiry
388914	Jeffrey	Guillen	600 J Street	Martinez	CA	94553	jguillen42077@yahoo.com	(925) 595-1928	Inquiry
386813	James	Tumlin Jr.	835 Talbart Street	Martinez	CA	94553	Jfunnypt@gmail.com	(760) 310-8284	Inquiry

Confirm that this report matches your lodge inquiry dashboard

4 - Inquiries

Name	Member #	Inquired	Last Activity	
Guillen, Jeffrey William	388914	09/22/2022	12/19/2022	✓
Tumlin Jr., James Lloyd	386813	07/18/2022	12/21/2022	✓
Cottrell, Jonathan Lee	391337	03/17/2023	04/05/2023	✓
Blagg, Jeffrey Curtis	388173	08/26/2022	12/21/2022	✓

Best practices on how to acknowledge Prospects

Upon receipt of inquiry

- Acknowledge in a timely manner
- Welcome message and personal invitation to meet you
- Phone call
- Always follow up with an email
- Text
- US Postal Service

(Do not rely on just 1 form of communication)

If non-responsive attempt to contact at least another two times using methods above. Have at least one-week in-between contact attempts.

Sample message to send unresponsive Prospect

Hi Christian,

The Brethren of Martinez Lodge were sorry that you were not able to attend our Prospect Information Night last week and hope all is well with you.

Having attempted to contact you by phone and several emails inviting you to our lodge events, we feel like now may not be the best time for you to pursue your interest in Freemasonry, but we will be here when you are ready. If you are still interested in becoming a Brother, please let me know. For the time being, we are now going to remove you from future direct communications from our lodge.

Thank you for your interest in Freemasonry, we hope to hear from you again soon.

Sincerely,

Michael Roberts, PM
Prospect Manager
Acalanes Fellowship Lodge No. 480
Phone: (415) 292-9135
mroberts@freemason.org



Monthly Prospect Surveys

All Prospects assigned to lodges will receive follow up emails and a survey to check in on their progress in the following intervals:

- 1 Month: The Core Tenets of Freemasonry
- 2 Months: How California Freemasons Give Back
- 3 Months: The Masonic Apron
- 5 Months: Becoming an Entered Apprentice
- 7 Months: Finding Fellowship & Friends in Freemasonry
- 9 Months: Becoming a Master Mason



Masons of California

Sharing your experience with the Masons of California

Please take a moment to complete this short survey. Your answers will be sent to our membership team and help shape the future of our prospective member experience.

* Please share the best email and phone number to reach you:

First Name:

Last Name:

E-Mail:

Phone Number:

Next

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See how easy it is to [create a survey](#).



Masons of California

Sharing your experience with the Masons of California

Please take a moment to complete this short survey. Your answers will be sent to our membership team and help shape the future of our prospective member experience.

* Please share the best email and phone number to reach you:

First Name:

Michael

Last Name:

Roberts

E-Mail:

mroberts@freemason.org

Phone Number:

(415) 292-9135

Next

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Masons of California

Connecting with a local lodge

* Hows your lodge experience going?

- ☐ Great! I've been speaking with or visiting the lodge.
- ☐ Not well, I need further guidance.
- ☐ I'm no longer interested at this time.

Prev

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Connecting with a local lodge

* Hows your lodge experience going?

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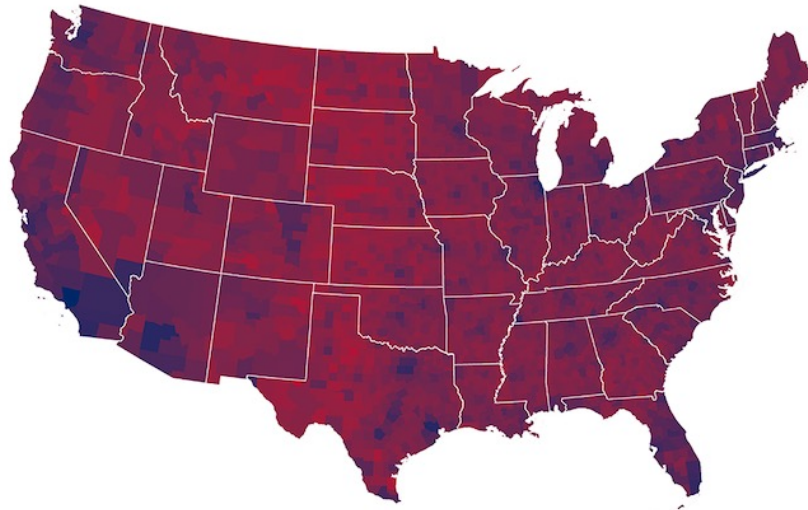
See how easy it is to [create a survey](#).



Where do you stand on current events?
Share your opinion.

Take the Survey

[SurveyMonkey Research Privacy Notice](#)





Masons of California

Connecting with a local lodge

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☐ Great! I've been speaking with or visiting the lodge.

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Next

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See how easy it is to [create a survey](#).



Masons of California

Lodge Experience

How can we help improve your lodge experience?

- ☐ The lodge hasn't contacted me.
- ☐ I'd like to be assigned to a new lodge.
- ☐ I've lost contact with the lodge and would like them to reach out to me again.
- ☐ I've been too busy to respond to the lodge or attend any events, but I'm still interested.
- ☐ Other (please specify)

Prev

Next

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Masons of California

Lodge Experience

How can we help improve your lodge experience?

☒ The lodge hasn't contacted me.

☐ I'd like to be assigned to a new lodge.

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☐ I've been too busy to respond to the lodge or attend any events, but I'm still interested.

☐ Other (please specify)

Prev

Next



Masons of California

Lodge Followup

We'll ask your assigned lodge to reach out using the details you've just shared.

If you have any other questions in the meantime, please let us know at memberservices@freemason.org.

Prev

Done

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Prev

Done

Powered by



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Masons of California

Lodge Experience

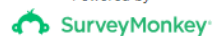
How can we help improve your lodge experience?

- ☐ The lodge hasn't contacted me.
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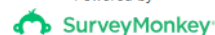
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☐ Other (please specify)

Prev

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See how easy it is to [create a survey](#).



Masons of California

Thanks for your feedback!

Thank you for taking the time to share your prospective membership experience with the Masons of California.

If you requested further assistance you'll soon be contacted by your local lodge or one of our Membership Advisors.

If you've any questions in the meantime, please e-mail memberservices@freemason.org

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☒ Other (please specify)

I would like to explore other lodges before I make my final decision.

Prev

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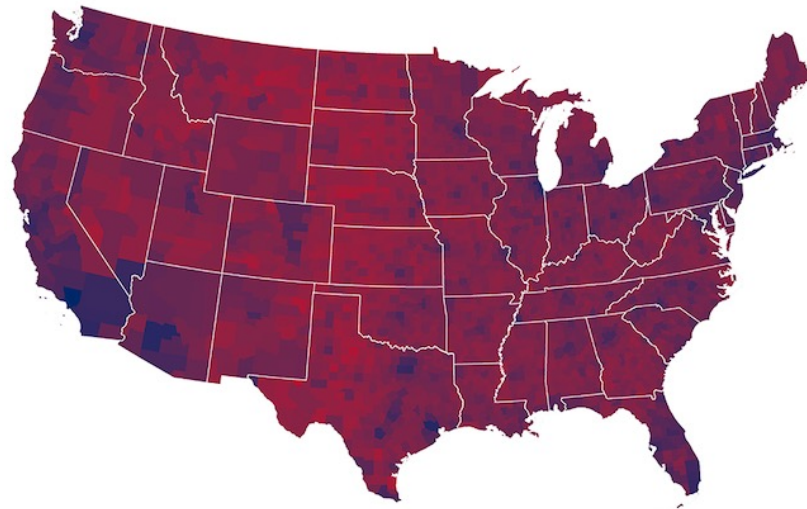


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Where do you stand on current events?
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Take the Survey

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Save the date!
Next semi-annual
Prospect Manager Association
Webcast is January 30, 2024 @ 6 PM

Prospect Manager Association meeting



Questions



Answers

Contact Us

Member Services



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