

BUILD A VIBRANT LODGE



A BLUEPRINT FOR A SUCCESSFUL FUTURE







TABLE OF CONTENTS

4 | **A Rewarding Member Experience**

- Nurture strong relationships between brothers.
- Create unique customs and traditions that clearly demonstrate why membership and active participation are special.
- Admit enthusiastic men who have made friends in the lodge.
- Orient Prospect and give new members extra support.
- Enable meaningful member participation and contribution.
- Prioritize member communication.

7 | **Resources for Lodges**

8 | **Memorable and Meaningful Degrees**

- Make every degree special.
- Help candidate coaches propel advancement.
- Develop deep ritual appreciation.
- Encourage ongoing learning.

10 | **Strong Lodges and Halls**

- Share the work of lodge leadership.
- Establish short- and long-term goals.
- Ensure revenue supports lodge goals.
- Maintain accurate membership and financial records.
- Ensure timely reporting to maintain tax-exempt status.
- Create a plan to preserve your hall.
- Cultivate and coach new lodge leaders.
- Increase public visibility.

14 | **Positive Impact on Society**

- Be proactive about relief.
- Support California Masonic charities.
- Give back to your community.
- Celebrate and encourage individual impact.

A REWARDING MEMBER EXPERIENCE

Lodges create a deep sense of fraternity and provide a highly rewarding member experience.

Nurture strong relationships between brothers.

Strong lodges are built upon friendships between brothers, and meaningful connections are developed one relationship and interaction at a time. Finding common interests with members you don't know well will encourage friendships and participation in lodge life, resulting in a stronger lodge.

IDEAS TO TRY

- Starting with active members, invite a brother you're not close to for coffee each month. Recruit your executive committee and other active members to follow suit.
- Host regular social events to give brothers an opportunity to connect in a casual setting.
- Ensure members from throughout the lodge build friendships with prospects before extending membership applications.

RESOURCES

Member Center

On The Level and
Pass It On

The Leader

Sept. 2016, Aug. 2014,
Jan. 2014, Aug. 2013

Create unique customs and traditions that clearly demonstrate why membership and active participation are special.

Creating meaningful practices that are unique to your lodge gives members an opportunity to connect and feel pride.

IDEAS TO TRY

- Write down existing customs and traditions – ritual regalia, dress code, candidate requirements, special meals, events, etc. Review the list with your lodge, and ask brothers which of these are most meaningful to them.
- Identify the types of customs most important to your lodge (ritual excellence, family-friendly meals, community service, Masonic education, etc.) and reflect this emphasis on your lodge website to attract men with similar interests.
- Ask members why they joined, and why they stay. Listen for what is important to them, and ask them to suggest new traditions.

RESOURCES

Member Center

On The Level and
Pass It On

Engage and Retain

The Leader

Sept. 2016, Aug. 2014,
Jan. 2014, Aug. 2013

Admit enthusiastic men who have made friends in the lodge.

Each brother shapes your lodge's future. Engage only with prospects who demonstrate a desire for deep relationships, curiosity to learn and improve themselves, and dedication to building something momentous. Admit these men only after they have built a network of friends at the lodge. Making a friend a brother is one of the most important activities of a lodge – educate and orient prospects before providing an application.



IDEAS TO TRY

- Invite good men in your life to attend a social event or mixer to meet the lodge and learn about the fraternity.
- Create a structured orientation process, ensuring each prospect builds friendships within the lodge before applying.
- Educate prospects by reviewing the Member Guide, discussing lodge customs and traditions, and setting expectations for participation.
- Provide applicants and candidates with Masonic education resources, such as a reading list of books and reputable websites.

RESOURCES

Member Center

On The Level and
Pass It On

Take Five

First a Friend

Member Skills and
Interests Survey

The Leader

Nov. 2016, Dec. 2013

Orient prospects and give new members extra support.

Prospects who become members are likely to remain active when they understand the value of their contributions to the lodge. Position them for success.



IDEAS TO TRY

- Survey new members to better understand their talents and interests, and connect them with like-minded brothers.
- Host "new member" evenings to give members and their families an opportunity to connect.
- Ask new members to participate in committees to make an immediate contribution and to build relationships.

RESOURCES

Member Center

Member Guide

Engage and Retain

The Leader

Dec. 2012

Enable meaningful member participation and contribution.

Engaged members are emotionally committed, actively participate, and have a clearly defined, meaningful role in the lodge. Help brothers understand that their presence and participation matters.



IDEAS TO TRY

- Encourage attendance at meetings and events by asking brothers to send regrets to the master if they cannot attend. Follow up with absent brothers and read regrets aloud, if possible.
- Survey members' skills and interests. Suggest involvement opportunities based on responses.
- When brothers propose new programs or events, be receptive – and encourage them to take the lead in their development and execution.

RESOURCES

Member Center

Engage and Retain
Member Skills and
Interests Survey
Member Survey
On The Level

Prioritize member communication.

In a successful lodge, members are connected and aware of lodge life. Officers share goals, challenges, and progress with members, and members share their opinions, perspectives, and ideas with officers. Open communication boosts engagement and encourages healthy relationships.



IDEAS TO TRY

- Create a communication plan to ensure all members receive important news and updates. Include your website, app, Trestleboard, social media, phone tree, and mailings.
- Schedule regular check-ins to request feedback and ideas – at stated meetings, during events, or one-on-one.
- Partner tech-savvy members with those who are less experienced to teach them how to participate in online dialogue.

RESOURCES

The Leader

Oct. 2016, July 2016

Lodge Services

The Lodge App
Lodge Website Template



RESOURCES FOR LODGES

Most resources noted in this book can be found on the Resources and Publications page of the Member Center at freemason.org, in the following sections:

- Communications tools
- Lodge support documents
- Masonic education
- Member assistance
- Membership development tools

Services from Grand Lodge

Visit freemason.org/lodgeservices for more information about:

- Intacct
- Tax preparation services
- PayPal
- Real estate support
- Lodge app
- Lodge website template and hosting services
- The Vault
- Iron Mountain Archival Storage

The Leader Monthly E-Newsletter

This monthly email is sent to all lodge officers and includes:

- Best practices from lodges around the state
- Monthly to-do lists for most lodge officers
- Reminders of upcoming events
- Quick links to important documents

View all past issues of The Leader at freemason.org/Leader

Helpful Contact Information

Member Services:

(415) 292-9180
memberservices@freemason.org

Intacct and Financial Administration Services:

(415) 292-9170
financialservices@freemason.org

Communications:

(415) 292-9180
communications@freemason.org

Lodge Support Committee

freemason.org/lodgesupportcommittee

Masonic Assistance:

(888) 466-3642
masonichome.org

MEMORABLE AND MEANINGFUL DEGREES

The ritual experience is our most cherished custom. Its teachings transform members' lives.

Make every degree special.

Receiving the degrees of Masonry should be one of the most important experiences in a man's life. A Mason receives each degree only once and through each degree he is transformed. Participating brothers have the honor of carrying the torch of Masonic light to a new member.



IDEAS TO TRY

- Ensure candidates have sufficient time to absorb lessons before each degree so they can fully benefit from the experience.
- In addition to the proficiency, ask the candidate to write a paper to reflect upon his personal growth as a result of each degree.
- Give each candidate a role within the lodge to bind him closer to the fraternity.
- Celebrate degrees through a special meal, festive board, or thoughtful presentations and mementos that will have lasting significance.

RESOURCES

Member Center

Engage and Retain
Member Skills and
Interests Survey
Member Survey
On The Level

Help candidate coaches propel advancement.

Each candidate's success begins with his coach. Help coaches succeed by creating structured support and accountability measures, and praising coaches for a job well done. An accountability system helps ensure that both the candidate and coach are focused on the candidate's transformation and individual study.



IDEAS TO TRY

- Ensure each coach has only as many candidates as he can comfortably devote himself to coaching.
- Ask coaches to report on candidates' advancement at each stated meeting and praise their progress.
- Set a degree schedule at the beginning of the year so the coaches and candidates have a goal for their proficiencies and degrees.
- Train coaches so they can best support candidates on the ritual and the deeper meaning of Masonry.

RESOURCES

Member Center

Candidate Learning Center
Candidate Guides for
Each Degree
Sample Candidate Progress
Report

The Leader

May 2016, June 2014,
Oct. 2012

Develop deep ritual appreciation.

Meaningful practices that are unique to your lodge give members an opportunity to connect and feel pride. Keep the excitement of self-improvement and learning alive after the degrees by dedicating time to this endeavor.



IDEAS TO TRY

- Encourage discussions about the ritual in your lodge, focusing on the meaning behind the words. Ask brothers to explain how sections of the ritual have grown more meaningful for them over time.
- Establish regular ritual rehearsals to ensure officers' skills are up to date for each degree.

Encourage ongoing learning.

Each Mason's connection to Freemasonry deepens throughout his lifetime, as he grows within the craft and as a man. Inspire your members to continue to seek wisdom through ongoing Masonic studies.



IDEAS TO TRY

- Host lectures and discussions of Masonic ritual and symbolism. Ask brothers to present original research, invite scholars from other lodges, or screen and discuss a Masonic education video.
- Encourage members to attend Grand Lodge-sponsored Masonic education events, such as the California Masonic Symposium, as well as educational events at nearby lodges.
- While brothers practice the ritual, ask them to reflect upon its significance, and share how it has inspired them.
- Ask brothers to read and discuss articles in California Freemason magazine, which is mailed every other month.

RESOURCES

The Leader

June 2016, June 2015

California Freemason

Masonic Education Articles

RESOURCES

Member Center

Masonic Education
Committee Speaker List

Freemason.org

Events
Masonic Education

The Leader

Feb. 2017, Feb. 2016,
Nov. 2014, March 2014

Henry Wilson Coil Library & Museum of Freemasonry

masonicheritage.org

Other

Northern California
Research Lodge
Archive Papers
Southern California
Research Lodge's
Magazine

STRONG LODGES AND HALLS

Strong lodges and halls support the good work of our members.

Share the work of lodge leadership.

Leadership requires teamwork and delegation. Each lodge's Executive Committee must participate in planning and executing lodge goals, contributing their unique strengths and perspective.



IDEAS TO TRY

- Convene a monthly Executive Committee meeting during which officers prepare agendas for stated meetings, track candidates' progress, assess budget and reporting responsibilities, and keep lodge plans in focus.
- Ensure each officer has clear responsibilities on what he must report each month.
- Permit officers to make mistakes and find solutions for correcting them.

RESOURCES

Member Center

Succession Planning Guide
Lodge Conversations

The Leader

Jan. 2017, Feb. 2015,
July 2014

Establish short- and long-term goals.

In order for your lodge to build a successful future, you must establish and benchmark goals. Begin by envisioning where your lodge should be in three to five years, then set achievable monthly or annual goals as stepping-stones towards that vision.



IDEAS TO TRY

- Devote a lodge meeting or retreat to developing a long-range plan. Set goals for membership, finances, future leadership, and material assets.
- Give regular updates and celebrate progress. Update annual goals throughout the year to keep them current.

RESOURCES

Member Center

Strategic Planning Guide
Lodge Conversations

The Leader

May 2015, March 2015,
Feb. 2013

Ensure revenue supports lodge goals.

In the history of our fraternity, dues and fees have helped lodges prosper and provide for future generations. Preserve the financial well-being of your lodge and hall by ensuring your dues and fees are sufficient to support your three- to five-year goals.



IDEAS TO TRY

- Create a five-year projected budget and calculate the income from dues and fees that you will need to make your vision a reality.
- Create perspective by benchmarking current dues and fees against historical or statewide figures.
- Ensure transparency by explaining this budget and any fee changes with your members. Help them understand how the right level of dues and fees are needed to attain your shared goals.

RESOURCES

Member Center

Revenue Planning Guide
Lodge Conversations

Historical Dues Charts

Lodge Support Committee

freemason.org/
lodgesupportcommittee

Maintain accurate membership and financial records.

Accurate membership and financial records are critical to lodge viability and can help avoid interpersonal conflict. Create accountability and reporting processes to keep records accurate and current, so that you can spend more time on building friendships, learning, and positively impacting society.



IDEAS TO TRY

- During Executive Committee meetings, review the accuracy of member records and financial statements. Plan to correct any errors, and identify process improvements.
- Update “live” documents currently stored in The Vault on freemason.org. For long-term archival storage, use storage solutions provided by Grand Lodge.
- Regularly remind members to update their personal information in the Member Center following moves or other life changes.

RESOURCES

Member Center

Lodge Conversations

Lodge Services

Intacct
Tax Preparation Services
Real Estate Support
The Vault
Iron Mountain Storage

The Leader

Feb. 2014

Lodge Support Committee

freemason.org/
lodgesupportcommittee

Ensure timely reporting to maintain tax-exempt status.

Every lodge is an independent nonprofit organization with reporting responsibilities to Grand Lodge and government entities. It is essential to comply with government regulations to maintain your lodge's tax-exempt status. Losing tax-exempt status is costly and complicated to restore.

IDEAS TO TRY

- Establish an annual reporting schedule early in the year, detailing which reports are due to Grand Lodge and government agencies. Use the Lodge Conversation document as a guide.
- Contact Grand Lodge's Member Services and Financial Services teams to learn about resources and services to ease reporting; many are offered at no charge.
- Read The Leader each month to review tasks that must be completed by each officer in the coming month.

RESOURCES

Member Center

Lodge Conversations

Lodge Services

Intacct

Tax Preparation Services

Real Estate Support

The Lodge Vault

Iron Mountain Storage

The Leader (Monthly)

Lodge Support Committee

freemason.org/

lodgesupportcommittee

Create a plan to preserve your hall.

If your lodge has a hall, it is likely the lodge's greatest material asset. It must be thoughtfully managed to give a positive impression to members and prospects, and to operate as an effective business. The master and senior warden are directors for the hall and are responsible for serving as full and active members. They should advocate for creating a vision that the hall association can use to develop an efficient operating plan.

IDEAS TO TRY

- Develop a multi-year maintenance and capital plan. Calculations must include furnishings, appliances, utilities, and taxes.
- Ensure your hall has adequate insurance and security, complies with zoning and use requirements, and fulfills tax-exempt reporting.
- If your hall requires improvements or a lease, sale, or purchase, contact Grand Lodge Real Estate Services and the Masonic Property Committee for support and required approval.

RESOURCES

Member Center

Lodge Conversations

Lodge Services

Intacct

Tax Preparation Services

Real Estate Support

Cultivate and coach new lodge leaders.

Leadership in Masonry requires time, energy, and preparation. Take a thoughtful approach to informing members about what it means to be ready for lodge office, both in terms of commitment and effort.



IDEAS TO TRY

- List the qualities a member must have for each office, including the length of membership time needed to reach that level of experience. Consider that some offices outside the progressive line can either be testing grounds for future leaders, or long-term offices for members with an affinity for the role.
- Provide mentorship opportunities within the Executive Committee and between lodge leaders and non-officers.
- Ensure that prospective officers for the progressive line are able to commit the necessary time and are ready for the job.

RESOURCES

Member Center

Succession Planning Guide

Lodge Conversations

The Leader

March 2016

Annual Leadership Retreats

Lodge Management

Certification Program

Increase public visibility.

Even if your lodge is doing great work, good men may not find you if the word hasn't spread beyond immediate friends and family. Make an effort to share your accomplishments with the greater community.



IDEAS TO TRY

- Build a strong online presence, using the lodge website template from Grand Lodge. Make it easy for prospective members to find your lodge.
- Encourage your members to share photos and news from lodge community events or celebrations through your lodge's social media and their own.
- Create a Community Outreach Committee, responsible for increasing the lodge's presence in the media.
- If your lodge is planning a community event, send a press release to local media outlets and call reporters to pitch a story for coverage.
- Schedule regular information nights and invite the public to learn more about Freemasonry.

RESOURCES

Member Center

Lodge Website Template

Lodge Media Kit

Communication Tools

On The Level and

Pass It On

The Leader

Jan. 2016, Aug. 2015,

Jan. 2015, Dec. 2014

POSITIVE IMPACT ON SOCIETY

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

Be proactive about relief.

As Masons, we are obliged to relieve the distress of fellow Masons and their families. It is essential to stay in touch and check in regularly with members of your lodge to offer help if they need it.



IDEAS TO TRY

- Ensure your Membership Retention Committee checks in regularly with absent members, older brothers, and widows who may need help. Consider including spouses and partners on the committee.
- Introduce the Lodge Outreach Program to your lodge and appoint a trainer who can provide guidance on reaching out to others.
- Involve new members and Masonic youth in outreach efforts.

RESOURCES

Member Center

Call Log
Home Visit Checklist
Need Request Form
Phone Script

The Leader

Sept. 2016, Oct. 2015,
Oct. 2014

Masonichome.org

Masonic Assistance can be reached at (888) 466-3642

Support California Masonic charities.

Charity has been at the heart of Freemasonry in California since the beginning. Your gift to our Masonic charities shows that vulnerable brothers, widows, children, and community members can count on us in times of need.



IDEAS TO TRY

- Commit your lodge to 100 percent officer giving. Then, expand to lodge committees, past officers, and even to all members.
- Help members understand their impact by visiting a Masonic Homes campus, attending a Masonic Outreach presentation, and reading the Annual Report in the January/February issue of California Freemason magazine.
- Invite a member of the California Masonic Foundation team to your lodge to talk about charitable initiatives and giving opportunities.

RESOURCES

Freemason.org/give

The Leader

Dec. 2016, Dec. 2015,
May 2014

Annual Report in the Jan/Feb issue of California Freemason magazine

Masonichome.org

Give back to your community.

California lodges have a rich history of supporting their communities. Share the benefits of brotherly love, relief, and truth by providing meaningful local support.



IDEAS TO TRY

- Ask your local public school how members can contribute – local schools often have wish lists of volunteer projects and donations that are needed.
- Support Masonic youth by creating a joint service project, acting as a mentor, or attending meetings and events.
- Attend (or organize) an April Public Schools Month celebration to recognize teachers and students in your community. Encourage members to join a Public Schools Advisory Council.

RESOURCES

Freemason.org

The Leader

March 2017, Aug. 2016,
April 2016, Sept 2015,
April 2015, Sept. 2014

Masons4Youth.org

Celebrate and encourage individual impact.

Even if your lodge is active in the community, chances are good that some members contribute individually. And, being a good father, husband, brother, son, employee, or mentor positively impacts our communities. Recognize and celebrate individual Masons' accomplishments and good work.



IDEAS TO TRY

- Survey members about their volunteer and mentoring efforts outside the lodge. Host an event to celebrate these efforts and ask members to share how Masonry has inspired them.
- Collect, and ask members to submit, volunteer and mentoring opportunities that fellow brothers may find interesting.

RESOURCES

Freemason.org

Member Survey



freemason.org