



# Engage and Retain

*guide to member retention*



A young man with short, curly hair is sitting on a set of concrete stairs. He is wearing a light-colored, long-sleeved button-down shirt and dark trousers. He has his hands clasped in his lap and is looking directly at the camera with a slight smile. The background is a bright, overexposed area, possibly a window or a bright outdoor space, creating a soft, warm glow around him. The overall color palette is warm and monochromatic, dominated by shades of beige and light brown.

Keeping brothers involved with the lodge is an ongoing process that demands constant attention. The process starts with welcoming the candidate, followed immediately with integrating the Entered Apprentice into the lodge, and continuing with diverse lodge programs and activities that retain member interest and involvement.

This guide will assist lodges in meeting the challenges of engaging and retaining members.

# First impressions set the stage for engagement and retention

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First impressions are the most lasting. Set the stage for engagement and retention by using the information materials provided in the 'Pass It On" program

## For prospective members use

- ◆ Wallet brochure
- ◆ "Who We Are and What We Do" brochure

## For applicants use the Applicant Kit

- ◆ Expanded "Who We Are and What We Do" brochure
- ◆ "Just the Facts" brochure

## For candidates use the Candidate Kit

- ◆ Letter from secretary acknowledging application
- ◆ "Candidate Information" brochure
- ◆ Letter from master after applicant approved for membership
- ◆ Letter from master's spouse after applicant approved for membership





## Integrate the Entered Apprentice into the lodge

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**A new member must immediately feel welcomed by the lodge and Grand Lodge in order to be motivated to advance and participate.**

- ◆ Notify Grand Lodge immediately after Entered Apprentice degrees are conferred. A welcome letter from the Grand Master and the *Member's Guide to Masonry in California* will be sent from Grand Lodge to the new Entered Apprentice.
- ◆ Involve the Entered Apprentice immediately in candidate coaching for the next degree.
- ◆ Place photos and short bios of new Entered Apprentices in the lodge bulletin, on the bulletin board and on the lodge Web site.
- ◆ Invite the Entered Apprentice and his family to public lodge events.
- ◆ Encourage the Entered Apprentice to attend other Entered Apprentice degrees of the lodge, and even degrees of other lodges so long as someone accompanies him.



# Conduct new member orientation

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Conduct new member orientation every month for recent initiates, even if it is just for one Entered Apprentice. If your lodge confers first degrees once a week, conduct the orientation for small groups once or twice a month. Instruct attendees to bring their copy of *Member's Guide to Masonry in California*.

The orientation should include the following two topics:

## **Lodge overview**

- ◆ Share the lodge's vision statement, plans and goals.
- ◆ Distribute and review "Your Lodge" information sheet (see template on page 13 and online at [freemason.org](http://freemason.org), member resources)
- ◆ Explain opportunities for involvement and how to participate. Engagement begins now.
  - Community service programs and activities
  - Committees
  - Lodge bulletin
  - Lodge Web site
  - Hall Association
  - Open events
  - Ritual teams
  - Other opportunities

## **Overview of Masonry in California**

Briefly explain key points found in the *Member's Guide to Masonry in California* (see overview on page 14 and online at [freemason.org](http://freemason.org), member resources).

## **Member skills and interest survey**

**In order to engage new members in lodge activities and community service programs, distribute and collect a member skills and interest survey at orientation**

Ask new members to complete an interests and skills survey. Put the information into a data base and use it when assigning tasks and activities (see survey on page 15 and online at [freemason.org](http://freemason.org), member resources).

## Engage with meaningful involvement

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A new Mason wants to feel welcome and involved. Engaging him immediately in lodge activities is important. Offer meaningful involvement opportunities that will keep him actively participating.

- ◆ Immediately after he becomes an Entered Apprentice, assign the new member a candidate coach and emphasize the importance of degree work.
- ◆ Conduct group candidate coaching nights.
- ◆ Assign members specific roles for degree work.
- ◆ Conduct a strong Masonic education program for all degree levels. Hold Masonic Formation/Education nights at the lodge.
- ◆ Encourage participation on committees and in community service and other events. Use the new member skills and interest survey to match the member with activities meaningful to him.
- ◆ If a new member has a viable idea for a community service activity or other event, let him coordinate the effort.
- ◆ Promote leadership opportunities and encourage taking on lead roles.
- ◆ Promote special interest groups within the lodge.

It's more challenging to keep the interest level high for Masons who have been members for awhile.

- ◆ Follow-up on absenteeism is vital. Reach out and contact brothers who haven't attended lodge for awhile. Do not assume all is well. Keeping in touch keeps you aware of the brother's status. Ask why he hasn't been at lodge. Enlist his involvement by assigning a duty for the next meeting or an upcoming special event. Let him know he's been missed and encourage attendance at an upcoming event. Offer aid and assistance when appropriate. Offer rides to meetings for those who are uncomfortable driving.
- ◆ Contact members in danger of suspension for non-payment of dues or who have requested a demit. Find out what assistance the lodge can give to forestall negative action.
- ◆ Rotate committee assignments to give all members a chance to try something new.
- ◆ Encourage members to take on different leadership responsibilities.
- ◆ Assign short-term or one-time responsibilities, such as calling absentee members, and widows, visiting sick members or driving older Masons to lodge. Determine the member's skills and interests and tailor his assignments according to his interests.



#### To engage older members and widows

- ◆ Maintain favorite activities of older members.
- ◆ Include daylight activities in lodge programming.
- ◆ Assign new members to check in on older members and widows who may be shut-ins or inactive but want to maintain contact with the lodge. New members benefit from this connection and can alert the lodge if an older member needs fraternal support.
- ◆ Record memories of older members about the lodge and their Masonic experience to develop and maintain a lodge history.



# Engage through ongoing communication

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Ongoing communication is vital for engaging and retaining brothers. Use all the tools and resources available to your lodge to stay in touch with members and reinforce your messages and information. Some people want to receive it in the mail, some will use the Web, and others like to hear it. Figure out how to make the most effective use of a variety of communication vehicles.

Periodically ask members if lodge communications and the tools used are effective and meeting their needs. Make changes as necessary.

## Communication tools that should be used by your lodge include:

**Web site** – Maintain a lodge web site. Keep it fresh with news, information, announcements, invitations, and links to the Grand Lodge and Masonic Homes of California Web sites. Potential members will also look to your Web site for information.

**Lodge bulletin** – Whether you print Trestleboard or post it on your lodge Web site, keep it short, easy to read and appealing to the eye.

**Telephone** – This offers a personal way of connecting, especially with those who have been absent.

**Emails** – Email messages and memos are effective on a personal level and for immediate communication needs. They work great for quick distribution of information and reminders to busy people.

**Meetings** – Make announcements, give reminders, extend congratulations and cover other information at stated meetings. Hearing news and information from leaders is important and reinforces what is in print or on your Web site. It also allows for feedback.

# Engage the spouse and family

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- ◆ Respect members' time. Surveys indicate that men with families generally have a limited number of hours available for outside activities due to time spent commuting, at work and shared responsibilities for the home and child care.
- ◆ Address the needs of brothers with young families and a working spouse.
- ◆ Consider offering baby sitting at the lodge during open meetings and events where wives are invited.
- ◆ Hold family-centered events.
- ◆ Have realistic expectations about family participation.
- ◆ Keep in touch with the family if the Mason is away from home on assignment.



# Know and meet member expectations

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Members have diverse expectations of their lodge and Masonic affiliation. Here are a few:

- ◆ Meet new people and establish new friendships
- ◆ Personal improvement and value reinforcement
- ◆ Be part of a relevant, respected, and values-driven organization
- ◆ Spend quality time with family and friends in a safe environment
- ◆ Opportunities to make a difference in the community
- ◆ Leadership opportunities
- ◆ Training opportunities for leadership and management roles
- ◆ Being valued and respected

If a member's expectations are not met or the member is not engaged in the lodge, the result can be an inactive member. Here are some reasons why members become inactive:

- ◆ The experience is not what he expected
- ◆ Lack of communication and follow-up by the lodge
- ◆ Meetings are too long; members' time is not respected
- ◆ Lack of opportunity for community service and to make a difference
- ◆ Lack of opportunity to study and explore Masonry's history and moral teachings in a meaningful way
- ◆ Unfriendly lodge atmosphere and culture
  - No one greets and talks with him
  - Squabbling between factions
  - Lack of civility and sensitivity
    - ◆ Racist or prejudicial comments
    - ◆ Jokes in bad taste
    - ◆ Lack of time





Ask candidates what they expect from their membership and involvement. Evaluate current programs and events. If they're not working, put them to rest. Periodically survey your members for new ideas that are executable and of interest.

Ask inactive members why they are not participating in lodge activities. Discuss the issues and make appropriate changes

Grand Lodge will determine if member needs and expectations are being met by conducting two types of short surveys:

#### **Candidate satisfaction survey**

- ◆ Immediately following completion of the first degree

#### **Member survey**

- ◆ Every two to three years

Grand Lodge will send the results confidentially to your lodge. Use this feedback to make adjustments and improvements.

# A fraternal concern and obligation

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Many members who are suspended or are demitting may need our help now or in the near future. The average age of a suspended member is 62 and he has been a member for an average of 27 years. The average age of a member seeking a demit is 67 and he has been a member for an average of 30 years. These members have shown a high degree of loyalty and interest in Masonry.

At these ages many of our brothers tend to have health concerns, lose long-established friendships, retire and lose their sense of purpose, or lose spouses. Some common health and age issues include:

- ◆ No longer able to drive at night
- ◆ Taking care of invalid spouse or relative
- ◆ Perceived lack of money to participate
- ◆ Memory issues
- ◆ Inability to sit for long period of time
- ◆ Hearing and sight disabilities

It is our fraternal obligation to reach out to these members to offer support, assistance and relief. If a member has not paid his dues or has not been to lodge for awhile, contact him or his family to determine the reason. If you are issuing a suspension, it is important that this contact be made prior to issuance. Determine if he needs assistance from Masonic Outreach Services or the Masonic Homes and initiate contact.

It is in the best interest of the lodge to retain older members and their involvement with the lodge in order not to lose their experience and mentoring of younger members. By maintaining his membership, the member is assured he and his widow will be provided fraternal care if needed.

Some lodges offer a life membership plan which forever exempts a participating member from paying annual dues in the lodge and prevents suspension for non-payment of dues. The member leaves an ongoing financial legacy to support lodge activities in perpetuity and he, his widow and/or orphans will always be eligible for relief. A discussion of the benefits of life membership will be helpful to members as they approach retirement and consider their financial affairs.

# Your Lodge

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(Insert lodge vision statement)

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YEAR LODGE FOUNDED \_\_\_\_\_

ADDRESS \_\_\_\_\_

PHONE ( ) \_\_\_\_\_ FAX ( ) \_\_\_\_\_

WEB ADDRESS \_\_\_\_\_

NUMBER OF LODGE MEMBERS \_\_\_\_\_

## Officers and contact information

MASTER \_\_\_\_\_

SENIOR WARDEN \_\_\_\_\_

JUNIOR WARDEN \_\_\_\_\_

SECRETARY \_\_\_\_\_

MEETING SCHEDULE \_\_\_\_\_

PROPER MEETING ATTIRE \_\_\_\_\_

DEGREE SCHEDULE \_\_\_\_\_

CANDIDATE COACHING SCHEDULE \_\_\_\_\_

MASONIC EDUCATION SCHEDULE \_\_\_\_\_

COMMUNITY SERVICE PROJECTS/ACTIVITIES \_\_\_\_\_

SOCIAL ACTIVITIES \_\_\_\_\_



# Overview Of Masonry In California

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## Degree work

- Advancing through the three degrees
- Receiving degrees outside California

## Discussing Masonry with non-Masons

## Membership

- Rights and duties
- Restricted or prohibited activities
- Dues
- Multiple lodge memberships
- Transferring lodge membership
- Withdrawal from lodge membership
- What to do if you have a life change (particularly if move or relocate job site)
- Visiting other lodges

## Your charitable contributions

- Annual fund
- Planned giving

## Fraternal support and philanthropic programs

- In case of need
- Masonic funeral
- Masonic Outreach Services
- Masonic Homes of California
- California Masonic Foundation

## Get involved

- Lodge leadership opportunities

## Leadership training

- Wardens' leadership retreats
- Secretaries' retreats
- Lodge Management Certification Program
- Masonic Formation Certification Program

## Masonic education

- Masonic education at the lodge
- Masonic Library and Museum
- Annual symposium
- California research lodges

## Communication and information sources

- California Freemason* magazine
- Lodge bulletin
- Web sites
- Annual communication
- "Pass It On" program
- "On the Level" program

## Grand Lodge

## Where to direct questions

# Skills And Interest

First name \_\_\_\_\_

Last name \_\_\_\_\_

Nickname \_\_\_\_\_

Coach \_\_\_\_\_

Birth date \_\_\_\_\_

Home address \_\_\_\_\_

Preferred contact       phone       email

Home phone \_\_\_\_\_

Work phone \_\_\_\_\_

Mobile phone \_\_\_\_\_

Email \_\_\_\_\_

Spouse or significant partner \_\_\_\_\_

Children (names, ages) \_\_\_\_\_

Education \_\_\_\_\_

Present occupation \_\_\_\_\_

Previous occupation \_\_\_\_\_

Hobbies \_\_\_\_\_

Community service \_\_\_\_\_

Community organizations member \_\_\_\_\_

Special skills \_\_\_\_\_

**I would like to participate in the following activities:**

Candidate coaching

Ritual team

Committee (list specific lodge committees)

\_\_\_\_\_  
\_\_\_\_\_

Other

\_\_\_\_\_  
\_\_\_\_\_



Masons of California