

2026



LEADERSHIP RETREATS



IRVINE * MAY 29-31



Masons
of California

RESOURCES FOR LODGES

MEMBER SERVICES:

(415) 292-9180

memberservices@freemason.org

FINANCIAL SERVICES:

(415) 292-9170

financialservices@freemason.org

COMMUNICATIONS:

(415) 292-9180

communications@freemason.org

MASONIC ASSISTANCE:

(888) 466-3642

masonichome.org

assistance@mhuc.org

SCAN TO
DOWNLOAD PRESENTATIONS
FROM THE WEEKEND:



TABLE OF CONTENTS

Message from the Grand Master 2

Extracurricular 3

Schedule Of Events 6

Learning Lab Descriptions 18

Notes 19

MY LEARNING PLANNER

Make getting from room to room easier during breakout sessions. Choose the sessions you'll be attending, then fill in the room for easy reference throughout the weekend.

SATURDAY

10:20 a.m.	Session: _____	Room: _____
11:20 a.m.	Session: _____	Room: _____
1:55 p.m.	Session: _____	Room: _____
2:55 p.m.	Session: _____	Room: _____
4:15 p.m.	Inspiring & Meaningful Stated Meeting	Room: _____

SUNDAY

8:30 a.m.	Session: _____	Room: _____
9:30 a.m.	Session: Implementing Keystone	Room: _____



Welcome to the 2026 Leadership Retreats!

WE HOPE YOU ENJOY this year’s Lodge Leadership Retreat, a weekend designed to strengthen the whole lodge team. We know leadership doesn’t rest on one set of shoulders. It takes a beehive—officers and members working together with clarity, purpose, and shared responsibility.

This year, we’ve introduced new tools aligned with the Keystone Initiative, and created more opportunities for practical, role-specific learning—while keeping the fellowship and camaraderie that make these retreats so meaningful.

New and seasoned members alike have told us they want meetings that offer learning, connection, and growth. So please don’t miss Saturday afternoon’s tiled session, The Inspiring, Uplifting, and Meaningful Stated Meeting. This session demonstrates how to streamline business, elevate education, and transform stated meetings into the centerpiece of a vibrant lodge experience.

New to the retreat? Join the First-Timers Gathering. Curious about outreach, leadership development, or lodge operations? There’s a breakout designed for you. Need hands on training on specific topics? Sign up for one of the new Learning Labs. And if you have questions for the Executive Committee or Grand Lodge staff, we’ll be here all weekend.

Learn a lot. Meet someone new. Strengthen your lodge. Masonry is stronger when we work together.

Fraternally,

Garrett S. Chan

Garrett S. Chan
GRAND MASTER

EXTRACURRICULAR

LEADERSHIP LOUNGE

Take time to plan with your team or connect with others in this dedicated space for collaboration. Stop by the Santa Clara (Saturday) and Los Angeles (Sunday) meeting rooms to brainstorm, problem-solve, or just catch your breath.

MIX & MINGLE COCKTAIL MAKING CLASS FOR SIGNIFICANT OTHERS

Enjoy a fun and creative afternoon socializing with guests who purchased the Significant Others Package. Meet in the lobby at 2:45pm. Shuttle will return at 5:00pm.

MIX & MINGLE **3:00PM TO 4:45PM** | NEWPORT MESA LODGE

1401 E 15th St, Newport Beach, CA 92663

Included in the price of “Significant Other” registration and optional.

YE OLDE PIN SWAP

Bring Masonic pins and challenge coins from your lodge, district, or personal collection to trade with brothers from across the state. It’s a fun way to share your lodge’s identity, discover new designs, and build connections.

Duration: Runs all weekend, with a focus during Saturday cocktail hour and dinner. A brief kickoff will take place Friday night.

What Pins Are in Play? Pins on your lanyard are open for trade; pins worn elsewhere are for display only.

Networking: Exchange digital contact information along with pins to stay connected after the retreat.

Cocktail Hour & Dinner: Surplus Grand Lodge pins will be available in a designated area, with space to mingle. The MC will highlight and encourage participation.

Pin King Award: Track exchanges below. The participant with the most trades will receive the “Pin King Award.” Honor system applies.

SATURDAY NIGHT: 1ST DEGREE EXEMPLIFICATION

Celebrating Unity, culture and brotherhood through diversity.

Round Table No. 329 in the Catalina Ballroom after dinner on Saturday.

SUNDAY MORNING DRAWING

Join us on Sunday morning for a drawing to win sweet treats, gift baskets, and Masonic prizes from our friends at LAFSCO and The Craftsman’s Apron. We’ll also be giving away two tickets to the Grand Master’s Gala!

RETREATS SPONSORED BY:



EXTRACURRICULAR

VENDORS AND MASONIC ORGANIZATIONS

Visit the tables in the lobby to learn more about the Masonic organizations that serve California:

- Masonic Homes/Acacia Creek
- Masonic Outreach Services
- Masonic Center for Youth and Families
- California Masonic Foundation
- Masonic Youth Organizations
- LAFSCO
- Civility
- Purple and Mint, LLC

ONSITE PEER MENTORING ON KEY LODGE & HALL TOPICS

One of the most valuable resources at this retreat is the experience of the participants in the room. Our goal is to intentionally connect participants who have deep knowledge in key areas of lodge and hall management with brothers who are looking for practical guidance.

During registration, participants may choose to identify themselves as an “expert” in one or more of the following seven areas by placing a sticker on their name badge:

1. Hall Management
2. Prospects to Members
3. Full Progressive Line
4. Retaining Members
5. Lodge Finances
6. Community Outreach
7. Can't Miss Stated Meeting

By wearing a sticker on your name badge, you are signaling that you are open to conversations and willing to share your experience with others who approach you with questions.

EXTRACURRICULAR

EXPAND YOUR NETWORK: SHARE YOUR DIGITAL CONTACT CARD

The network you can build at this retreat is one of its greatest strengths. We encourage participants to exchange digital contact cards with one another so conversations that begin here can continue long after the weekend ends.

For iPhone (iOS):

1. Open the Contacts app.
2. Tap My Card (at the top of your contact list).
3. Make sure your information is complete and up to date.
4. Tap Share Contact to text, email, AirDrop, or share in another way.

For quick in-person sharing, you can also use NameDrop (hold your iPhone near another iPhone to share contact info instantly).

For Android:

1. Open the Contacts app.
2. Tap Your Profile or My Info at the top.
3. Update your details if needed.
4. Tap Share to send your contact via text, email, QR code, or nearby share feature.

If you're unsure how to access these features, stop by the registration table—we're happy to help. A strong lodge network starts with a simple exchange.

SCHEDULE OF EVENTS

FRIDAY PRE-RETREAT ACTIVITIES

PRE-RETREAT ACTIVITIES

4:00 p.m.–6:00 p.m.

THE COVES, POOL DECK

SHRINER WEEKEND WELCOME

Step into the fellowship of the weekend with Shriner hospitality. This gathering sets the stage for the retreat. Strengthen the bonds of brotherhood and reflect on the shared values that unite us in Masonry.

4:00 p.m.–7:15 p.m.

CATALINA BALLROOM

GRAFFITI WALL

What Makes the Masonic Journey Unique in Your Lodge?

Write down your intention for the weekend by answering the question, “What Makes the Masonic Journey Unique in Your Lodge?” Share your goals, reflections, and insights throughout the weekend.

6:30 p.m.–7:00 p.m.

HARBOR ROOMS 203 & 205

FIRST-TIMERS PRE-RETREAT GATHERING

Suggested for first-time retreat participants

This session is your compass for the retreat journey. First-time participants will learn how to navigate the event, set intentions, and forge purposeful connections with like-minded brothers.

SCHEDULE OF EVENTS

FRIDAY

7:15 p.m.–7:45 p.m.

CATALINA BALLROOM

BUILDING MASONIC BONDS

Start the weekend with energy and excitement. Learn what’s in store for you, including opportunities to grow and connect. Get tips on how to make the most of your retreat and begin your weekend’s journey with clarity and purpose.

7:45 p.m.–8:30 p.m.

CATALINA BALLROOM

MINI MEET-UP:

Setting Your Weekend’s Learning Journey

Kick off the retreat with a high-energy, participant-driven Mini Meet-Up designed to surface what really matters. Facilitated stations around the room focus on a core topic facing lodges today. The conversations are not about answering all questions; they’re about getting to the heart of the topic. Move around to as many stations as your lodges needs.

8:30 p.m.–8:40 p.m.

CATALINA BALLROOM

OUR VISION FOR THE FUTURE: THE KEYSTONE INITIATIVE

Join us for an introduction to the Keystone Initiative, the fraternity’s roadmap for the future. This session will provide an overview of the strategic plan and its purpose: building engagement, vitality, and impact across our lodges and communities.

SCHEDULE OF EVENTS

FRIDAY

8:40 p.m.–9:00 p.m.

CATALINA BALLROOM

THE KEYSTONE INITIATIVE: Demonstrate Our Value to Our Communities

This session introduces the **Community pillar** of the Keystone Initiative, which centers on visible service and philanthropic engagement. We'll explore how California Masons are partnering with organizations, creating meaningful service opportunities, and supporting community needs. Learn about the impact of statewide efforts that connect lodges and members to service opportunities.

9:00 p.m.–9:30 p.m.

CATALINA BALLROOM

WHY COMMUNITY VOLUNTEERING MATTERS Leadership Keynote

Bryan Wong | Chief Executive Officer
Habitat for Humanity San Gabriel Valley

Community volunteering is one of the clearest ways we put our values into action beyond the lodge. Hear real stories of service and volunteering that illustrate how showing up for others builds trust, strengthens relationships, and deepens our connection to the communities we serve. Participants will leave with a renewed understanding that service doesn't just meet immediate needs; it strengthens the ties that hold communities and our fraternity together.

9:30 p.m.–9:45 p.m.

CATALINA TERRACE

DESSERT WITH THE CALIFORNIA MASONIC FOUNDATION

Wrap up the evening with relaxed and meaningful conversations with dessert provided by the **California Masonic Foundation**. Whether it's sharing your favorite moments from the day or discussing what inspires you most, this is your time to connect and celebrate the spirit of brotherhood.

SCHEDULE OF EVENTS

SATURDAY

8:00 a.m.–8:30 a.m.

SALONS D & E

COFFEE CHAT

Ease into the day with coffee and conversation. This informal gathering is the perfect way to connect with brothers, spark new ideas, and start the day energized.

Sponsored by California Scottish Rite

8:30 a.m.–9:40 a.m.

SALONS D & E

THE KEYSTONE INITIATIVE Build Strong and Confident Leaders

This morning session highlights **Build Strong and Confident Leaders** Pillar which emphasizes how intentional leadership development strengthens lodges. Understand how to use this team to ensure lodge officers know what is expected of them and to support them to do their best. Learn how the Executive Committee can become the hub of planning work through the example of managing prospects to receiving their degrees.

9:40 a.m.–10:00 a.m.

SALONS D & E

NEW RESOURCES FOR HALLS AND THE INSURANCE CAPTIVE

Our halls are at the heart of our lodges. Topics include programs that help lodge halls thrive as vibrant community assets, along with updates on the insurance captive program and other initiatives that make management and long-term planning simpler and more cost-effective.

LEGEND SUGGESTED TRACKS FOR OFFICERS

- EXECUTIVE (MASTERS)
- ◆ MEMBERSHIP (JUNIOR WARDENS, MARSHALS, SENIOR DEACONS, CHAPLAINS)
- ▼ FINANCE (TREASURERS)
- * RITUAL (OFFICERS' COACHES, MUSICIANS, TILERS)
- ▲ EDUCATION (SENIOR WARDENS & JUNIOR DEACONS)
- ADMINISTRATION (SECRETARIES)
- ♥ SOCIAL (STEWARDS)

SCHEDULE OF EVENTS

SATURDAY

10:20 a.m.–11:10 a.m.

BREAKOUT SESSIONS

The Special Breakouts of the Role of the Officers in the Beehive of the Lodge

■ Master (and later Past Master)

SANTA BARBARA / RANCHO LAS PALMAS

The Master sets direction, models behavior, and keeps the lodge moving together. Learn how the role of Past Master helps sustain continuity and support future leaders.

▲ Senior Warden and Junior Deacon LOS ANGELES / IRVINE

Senior wardens and junior deacons guide members from first interest to lifelong engagement. Learn how each role builds on the last to create a meaningful member journey.

◆ Junior Warden, Marshall, Senior Deacon, and Chaplain

BERKELEY / ANAHEIM

These officers attract, welcome, and retain members at every stage. Learn how to work together to build connection and hand off relationships with care.

▼ Treasurers and Assistant Treasurers

NEWPORT BEACH / MARINA DEL REY

Learn how Treasurers support the lodge through strong financial stewardship and clear reporting. Understand how sound financial practices strengthen planning and trust.

● Secretaries and Assistant Secretaries SALONS A - C

Discover how secretaries keep the lodge organized through communication, records, and coordination. Learn practical ways this role supports both officers and members.

* Officers Coaches, Musicians, and Tilers HARBOR ROOM 205

These roles strengthen the quality and meaning of the Masonic experience. Learn how preparation and consistency build confidence and pride in the work.

♥ Stewards HARBOR ROOM 203

Stewards create opportunities for fellowship and connection. Learn how small acts of hospitality help strengthen lodge culture and belonging.

11:20 a.m.–12:10 p.m. BREAKOUT SESSIONS

■ Delegation for Success: Empowering Your Team

SANTA BARBARA / RANCHO LAS PALMAS

This session equips you with tools to build trust, reduce burnout, and foster ownership among officers, enabling them to thrive in their roles and drive lodge success collaboratively.

▲* The Symbolic and Ceremonial Significance of Rituals

LOS ANGELES / IRVINE

Immerse yourself in the timeless significance of Masonic rituals, exploring their spiritual, historical, and symbolic importance. This session deepens appreciation for rituals as a cornerstone of tradition and a reflection of Masonic values.

◆♥ The Welcoming Committee: Creating a Warm First

Impression When Talking to Prospects BERKELEY / ANAHEIM

This session covers active listening, understanding prospects' needs, and effectively communicating the value of lodge membership, building trust and excitement that inspire candidates to take the next step in their Masonic journey.

◆ SPECIAL OUTREACH FOCUS

The Heart of the Lodge: Introduction to Outreach

HARBOR ROOM 205

The role of the Chaplain has always been the spiritual heart of the lodge, but the Lodge Outreach Program provides the structure to turn that compassion into action. This session connects directly to the obligations you took at the altar to aid and assist our distressed brethren and their families.

▼ Risk Management and Insurance Coverage for

Lodges and Halls NEWPORT BEACH / MARINA DEL REY

This session emphasizes practical strategies to safeguard assets and comply with regulations while maintaining financial and operational integrity. Participants will explore tailored insurance programs designed to meet the unique needs of individual halls.

● Welcoming New Members: Secrets of an Engaging

Onboarding Process SALONS A - C

Craft an onboarding experience that inspires long-term member engagement. This session provides tips for creating welcome kits, tracking progress through degrees, and integrating new members into lodge life.

SCHEDULE OF EVENTS

SATURDAY

12:25 p.m.–1:40 p.m.

SALONS D & E

LUNCH & MEET OUR YOUTH ORDER LEADERS AND OUR SENIOR GRAND WARDEN

Recharge over lunch while meeting our youth order leaders and the Senior Grand Warden.

THE KEYSTONE INITIATIVE: DEEPEN OUR MASONIC EXPERIENCE

From enhancing the quality and relevance of meetings to enriching ritual, mentorship, and member onboarding, this pillar reinforces the idea that Masonry should be a journey of purpose and connection that inspires long-term engagement.

1:55 p.m.–2:45 p.m.

BREAKOUT SESSIONS

■ Managing Lodge Issues: Practical Problem-Solving for Masters SANTA BARBARA / RANCHO LAS PALMAS

This session focuses on proactive strategies for resolving conflicts, addressing member concerns, and maintaining lodge harmony. Gain tools to identify issues early, facilitate open communication, and guide the lodge through difficult situations effectively.

▲* Mentoring that Makes a Difference LOS ANGELES / IRVINE

Learn the essentials of effective mentoring in this practical session focused on building trust and openness, setting clear expectations, offering guidance that builds confidence, and modeling the values at the heart of our fraternity.

◆● Strengthening the Craft: Retention and Member Engagement SALONS A - C

This session explores practical approaches to supporting brothers at risk of suspension for non-payment of dues, guiding meaningful conversations through the restoration campaign, and building systems that encourage long-term engagement.

◆ SPECIAL OUTREACH FOCUS

More Than a Home: The Complete Guide to Masonic Services

BERKELEY / ANAHEIM

When a brother is in distress, knowing exactly what resources are available can change his life. Including: Residential Options, Masonic Outreach Services, and Emotional Wellness.

▼ Strategic Budgeting and Financial Stability: Lodge and Hall Association Planning

NEWPORT BEACH / MARINA DEL REY

This practical session will help you learn simple, hands-on ways to inspire others, strengthen collaboration, and create a lodge culture grounded in purpose and Masonic values.

♥ Creating Experiences, Fellowship and Connections vs. Planning Events HARBOR ROOM 203

This session emphasizes the importance of creating impactful and engaging activities that foster camaraderie and align with your lodge's mission, while seamlessly integrating all lodge activities into a cohesive calendar.

LEGEND SUGGESTED TRACKS FOR OFFICERS

- EXECUTIVE (MASTERS)
- ▲ EDUCATION (SENIOR WARDENS & JUNIOR DEACONS)
- ◆ MEMBERSHIP AND OUTREACH (JUNIOR WARDENS, MARSHALS, SENIOR DEACONS, CHAPLAINS)
- ▼ FINANCE (TREASURERS)
- ADMINISTRATION (SECRETARIES)
- * RITUAL (OFFICERS' COACHES, MUSICIANS, TILERS)
- ♥ SOCIAL (STEWARDS)

SCHEDULE OF EVENTS

SATURDAY

2:55 p.m.–3:45 p.m. BREAKOUT SESSIONS

■ **Fine Tune the Beehive: Running the Executive Committee**

SANTA BARBARA / RANCHO LAS PALMAS

Lead your executive committee with clarity and purpose, using practical strategies to integrate systems and streamline operations. This session highlights how strong leadership teams drive lodge success while embodying the mission of Masonic governance.

▲ **Exploring Member Education: Program Options and Implementation**

LOS ANGELES / IRVINE

Create transformative learning experiences by tailoring Masonic education programs to your lodge's unique needs. This session explores impactful initiatives that deepen understanding, nurture leadership, and uphold the enduring values of Masonry.

◆ **SPECIAL OUTREACH FOCUS**

Mobilizing Your Lodge: Building Effective Outreach Committees

BERKELEY / ANAHEIM

This workshop focuses on the practical steps of forming and maintaining active Outreach committees, including Sunshine, Widows, and Member Retention committees.

▼● **What's New in iMember: Focus on iMember Accounting**

SALONS A - C

This session offers a guided walk-through of updates to iMember's, including a review of the new accounting tools. Learn detailed steps to maintain accurate records, track income and expenses, and produce transparent financial reports.

* **Ritual Readiness: Training for Excellence**

HARBOR ROOM 205

Develop coaching techniques to guide officers in achieving ritual proficiency and mastering their roles. This session emphasizes mentoring practices that maintain tradition, enhance team performance, and contribute to the lodge's overall ritual excellence.

♥ **Risk Management in Events: Rules Governing Fundraisers and Alcohol**

HARBOR ROOM 203

Ensure the success of your lodge's events by mastering risk management principles rooted in responsibility and professionalism. This session focuses on compliance with fundraising and alcohol regulations to uphold the integrity and safety of Masonic gatherings.

3:45 p.m.–4:15 p.m.

SALONS D & E FOYER

ICED TEA AND COFFEE BREAK with Our Youth Orders

Grab a cup of coffee or a glass of iced tea and meet our youth order members one-on-one.

4:15 p.m.–5:30 p.m.

CATALINA BALLROOM & SALONS F-H

THE INSPIRING, UPLIFTING, AND MEANINGFUL STATED MEETING

Members have repeatedly shared that stated meetings are not offering the learning and growth that they expect. Here, participate in a demonstration of how stated meetings can be streamlined to strengthen the lodge experience.

5:30 p.m.–7:00 p.m.

SALONS D & E FOYER

CORNHOLE COMPETITION & COCKTAIL HOUR

Take this time to unwind, connect, and have some fun and join us for a **No-Host Cocktail Hour** and friendly **Cornhole Competition** with Masonic Homes team members. Whether you're playing or cheering from the sidelines, this Masonic Homes-sponsored evening is the perfect blend of connection, relaxation, and friendly rivalry.

Sponsored by the Masonic Homes of California

7:00 p.m.–9:00 p.m.

SALONS D & E

DINNER, YE OLDE PIN SWAP, AND "FIRESIDE CHAT" WITH THE DEPUTY GRAND MASTER

End the day on a high note. During dinner, our Deputy Grand Master will share his vision for our fraternity through a fireside chat-style interview. Then, celebrate the symbols, stories and traditions that make our fraternity unique by participating in the Ye Olde Pin Swap. Bring your Masonic pins and challenge coins from your personal collections and trade them with brothers.

SCHEDULE OF EVENTS

SUNDAY

8:00 a.m.–8:30 a.m.

SALONS D & E

COFFEE CHAT

Start your final day with great conversation.

Sponsored by California Scottish Rite

8:30 a.m.–9:20 a.m.

BREAKOUT SESSIONS

◆ Inspiring Tomorrow: The New and Renewed Lodge Development Journey

SANTA BARBARA / RANCHO LAS PALMAS / SANTA CLARA

This session highlights what it takes to create lodges that honor our past while building a meaningful future. Learn how Grand Lodge resources can help transform your vision into a lodge that inspires belonging, strengthens brotherhood, and thrives for generations to come.

▲ The Candidate Education Program: Coaching Entered Apprentices and Fellowcrafts

SALONS A & B1

This session focuses on creating meaningful connections, fostering growth, and ensuring candidates understand and embrace the principles of Masonry. Gain tools to guide candidates effectively, building confidence and engagement in their Masonic experience.

▼ Audit Preparation and Financial Reviews: Ensuring Compliance and Accountability

NEWPORT BEACH / MARINA DEL REY

Walk away with the knowledge and tools to confidently prepare for audits and inspector reviews. In this session, participants will learn step-by-step methods for organizing financial records, conducting transparent financial reviews, and ensuring compliance with IRS regulations. Discover how these practices not only build trust and accountability but also position your lodge for financial excellence.

● Modern Tools for Lodge Management

SALONS B2 & C

Learn iMember tips, explore email and survey tools, and simplify event planning with digital resources. This session highlights ongoing iMember training opportunities, empowering secretaries to manage their lodges efficiently and effectively.

* Enhancing the Degree Experience: Music, Regalia, and Paraphernalia

HARBOR ROOM 205

Discover how music, regalia, and paraphernalia can transform degree ceremonies into meaningful experiences. This session provides tools to manage these elements effectively, creating a memorable atmosphere that inspires candidates and enriches the lodge's traditions.

♥ Community Engagement: Building Connections Beyond the Lodge

HARBOR ROOM 203

Strengthen your lodge's role in the community by hosting events that reflect the principles of Masonry. This session offers strategies to build relationships, demonstrate leadership, and showcase a commitment to service and connection beyond the lodge.

9:30 a.m.–10:25 a.m.

VARIOUS

IMPLEMENTING THE KEYSTONE INITIATIVE IN YOUR LODGE

Meet with your lodge to put the Keystone Initiative to work.

10:40 a.m.–11:15 a.m.

SALONS D & E

LODGEAPP DEMONSTRATION: Your Working Tool for Engaging Meetings

Get a demonstration of a new app designed to help you write a cohesive agenda, script your meeting, including short Masonic Education sessions, and produce the minutes in one tool.

11:15 a.m.–12:00 p.m.

SALONS D & E

TYING THE WEEKEND TOGETHER

Reflect on the lessons of the weekend and look ahead with inspiration. This keynote will connect the themes of the retreat, providing you with the motivation and focus to bring what you've learned back to your lodge. What is the 1% change you'll make at your lodge?

LEARNING LABS

Hands-on, 15–20 minute workshops covering iMember, accounting, websites, payments, reporting, newsletters, and more.

Format

Use one of 12 provided laptops to follow along and practice with facilitator guidance. Personal devices are not permitted.

Who Should Attend

Secretaries, treasurers, communications volunteers, and lodge leaders looking to build confidence and improve lodge operations.

LOCATION: HARBOR ROOM 207

TIME	TOPIC	DESCRIPTION
SATURDAY 11:20–11:40 a.m.	Entering Bills in iMember	Step-by-step bill entry and payment: vendors, reimbursements, salaries, expense categories, and payments (check, ACH, online).
SATURDAY 11:45 a.m. – 12:05 p.m.	Financial Reporting in iMember	Run key reports, enter budgets, and generate clear financial summaries for planning and transparency.
SATURDAY 1:55–2:10 p.m.	Bank Reconciliation	How to record donation, stated meeting receipts, and other income/receipts.
SATURDAY 2:15–2:30 p.m.	Recording Non-Dues Receipts	Enter donations, meeting receipts, and other income with proper categorization and reporting.
SATURDAY 2:55–3:10 p.m.	Entering Applications in iMember	Input candidate data, track status, and maintain accurate membership records.
SATURDAY 3:15–3:30 p.m.	Membership Reporting in iMember	Generate reports on membership, status changes, and dues tracking for planning and compliance.
SATURDAY 3:35–3:50 p.m.	Online Payments & Autopay	Manage online payments, enroll members, and track Autopay activity.
SUNDAY 8:30–8:50 a.m.	Lodge or Hall Website Setup	Overview of templates, required content, and steps to launch with staff support.
SUNDAY 8:55–9:15 a.m.	Social Media Tips & Tricks	Best platforms, content ideas, and simple strategies to boost engagement and visibility.

FRIDAY NOTES

What was most inspiring for me tonight?

How have these sessions changed the way I think about Masonry?

What am I looking forward to this weekend?

SUNDAY NOTES

Who did I meet who I want to keep in touch with?

What new idea am I most excited about?

What is the 1% change I can make in the next month?



We're Here for You

RELIEF FOR CALIFORNIA MASONS AND THEIR FAMILIES

- Information and referrals
- Statewide Masonic Outreach Services for members of all ages and their families
- Senior living villages in Covina and Union City, including assisted living and memory care, skilled nursing, and short term rehabilitation after surgery
- Shared housing for seniors in Covina

CONTACT US TODAY TO ACCESS SERVICES:

masonichome.org

(510) 380-5511
FOR LIVING IN UNION CITY

(888) 466-3642
FOR LIVING IN COVINA

Masonic Center for Youth and Families
Mental Health Services | mcyaf.org

(877) 488-6293 UNION CITY

(626) 251-2300 COVINA

Masonic Value Network

CARE RESOURCES + PRESCRIPTION DISCOUNTS

masonichome.org/valuenetwork

2026



LEADERSHIP RETREATS



Masons
of California