

2026



LEADERSHIP RETREATS



SAN RAMON * APRIL 24-26



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@mhcuc.org

SCAN TO
DOWNLOAD PRESENTATIONS
FROM THE WEEKEND:



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MY LEARNING PLANNER

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

SATURDAY

10:10 a.m.–11:00 a.m. Session: _____ Room: _____

11:10 a.m.–12:00 p.m. Session: _____ Room: _____

1:20 p.m.–2:10 p.m. Session: _____ Room: _____

2:20 p.m.–3:10 p.m. Session: _____ Room: _____

4:05 p.m.–5:30 p.m. Inspiring & Meaningful Stated Meeting Room: _____

SUNDAY

8:30 a.m.–9:20 a.m. Session: _____ Room: _____

9:30 a.m.–10:20 a.m. Keystone Initiative: _____ 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 Leadership Lounge throughout the weekend to brainstorm, problem-solve, or just catch your breath.

SUNDAY MORNING DRAWING

Join us on Sunday morning for a chance 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!

PAINT AND SIP EVENT FOR SIGNIFICANT OTHERS

Enjoy an afternoon of creativity and socializing with guests who are not in the sessions. We will meet in the lobby at 2:30pm and carpool together.

PAINT N SIP 3:00pm-5:00pm | Pinot’s Palette Danville

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.

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 Assistance

Masonic Center for Youth and Families

California Masonic Foundation

Masonic Youth Organizations

LA Fraternal Supply Company

(San Ramon and Irvine only)

RETREATS SPONSORED BY:



EXTRACURRICULAR

CONTINUED

ONSITE PEER MENTORING ON KEY LODGE & HALL AREAS

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. This is peer-to-peer mentoring—informal, approachable, and focused on real-world solutions.

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. A Leadership Development Committee member will host a dedicated table at registration to explain the purpose, distribute stickers, record participant names, and provide simple tips for meaningful mentoring conversations.

This initiative is designed to spark practical dialogue, strengthen connections across lodges, and ensure that no leader leaves the retreat without access to the insight and support they need.

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. A quick contact share can turn a great idea into an ongoing collaboration between lodges.

Members of the Leadership Development Committee will host a table at registration to help you set up and share your digital contact card. It only takes a few minutes, and we'll walk you through it.

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 EVENING PRE-RETREAT ACTIVITIES

PRE-RETREAT ACTIVITIES

4:00 p.m.–6:00 p.m.

SHRINER WEEKEND WELCOME

Step into the fellowship of the weekend with Shriner hospitality. This gathering sets the stage for the retreat, offering a space to connect with old friends and meet new ones. Strengthen the bonds of brotherhood and reflect on the shared values that unite us in Masonry.

4:00 p.m.–7:15 p.m.

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. This activity symbolizes our collective commitment to strengthening leadership through shared work.

6:30 p.m.–7:00 p.m.

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. Together, we build a network of shared purpose and growth.

FRIDAY EVENING GENERAL SESSIONS

7:15 p.m.–7:45 p.m.

WELCOME & MEETING NEW BROTHERS Building Masonic Bonds

Start the weekend with energy and excitement. Learn what’s in store for you, including opportunities to grow, connect, and be inspired. 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.

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 at these stations are intentionally not about answering all questions about the topic; they’re about getting to the heart of the topic. By thinking bigger about your topics and naming what’s real on Friday night, you can open up the rest of the weekend to learn and make connections. Move around to as many stations as your lodges needs.

8:30 p.m.–8:40 p.m.

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 EVENING GENERAL SESSIONS

CONTINUED

8:40 p.m.–9:00 p.m.

THE KEYSTONE INITIATIVE: Demonstrate Our Value to Our Communities & Extending Our Light Beyond the Lodge

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, helping demonstrate the values and relevance of Freemasonry in the communities we serve.

9:00 p.m.–9:30 p.m.

LEADERSHIP KEYNOTE: Why Community Volunteering Matters

Community volunteering is one of the clearest ways we put our values into action beyond the lodge. In this session, participants will 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. These shared experiences create lasting bonds—among brothers, with community partners, and with neighbors—and help our lodges remain visible, relevant, and respected. 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.

PRE-FUNCTION LOBBY

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.

9:45 p.m.

BISHOP GRILLE

BEST CONVERSATIONS

Keep the conversation going! Meet at hotel bar for further conversations.

SCHEDULE OF EVENTS

SATURDAY GENERAL SESSIONS

8:00 a.m.–8:30 a.m. 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. *Coffee break sponsored by California Scottish Rite*

8:30 a.m.–8:40 a.m. WELCOME & DAY OUTLINE

Find out what's planned for the day and set your intentions. With plenty of opportunities to learn, connect, and grow, this session ensures you're ready to make the most of your Saturday.

8:40 a.m.–8:50 a.m. THE KEYSTONE INITIATIVE Build Strong and Confident Leaders

This morning session highlights **Build Strong and Confident Leaders** Pillar emphasizing how intentional leadership development strengthens lodges. We'll introduce key resources and practices that support officers and members across the fraternity, helping ensure that leadership roles are rewarding, supported, and built on mentorship and shared understanding.

8:50 a.m.–9:40 a.m. BUILD STRONG AND CONFIDENT LEADERS Through the Executive Committee

Learn why the Executive Committee is the key to running a smooth lodge. 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.–9:50 a.m.

YOUTH ORDER INTERVIEWS: The Important Role Youth Orders Play in Our Society

Part-interview, part- game show, the representatives of our youth orders pick questions from a special deck about why our communities need youth orders.

10:10 a.m.–11:00 a.m. BREAKOUT SESSIONS 1

- Delegation for Success: Empowering Your Team
- ▲* The Symbolic and Ceremonial Significance of Rituals
- ◆♥ The Welcoming Committee: Creating a Warm First Impression When Talking to Prospects
- ◆ **SPECIAL** OUTREACH FOCUS
 - ▼ The Heart of the Lodge: Introduction to Outreach
 - ▼ Risk Management and Insurance Coverage for Lodges and Halls
 - Welcoming New Members: Secrets of an Engaging Onboarding Process

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 GENERAL SESSIONS

CONTINUED

11:10 a.m.–12:00 p.m.

BREAKOUT SESSIONS 2

- Understanding the Role of the Master (and later Past Master) in the Beehive of the Lodge
- ▲ Understanding the Role of the Senior Warden and Junior Deacon in the Beehive of the Lodge
- ◆ Understanding the Role of the Junior Warden, Marshal, Senior Deacon, and Chaplain in the Beehive of the Lodge
- ▼ Understanding the Roles of the Treasurers (and their assistants) in the Beehive of the Lodge
- Understanding the Roles of the Secretaries (and their assistants) in the Beehive of the Lodge
- * Understanding the Role of Officers Coaches, Musicians, and Tilers in the Beehive of the Lodge
- ♥ Understanding the Role of the Stewards in the Beehive of the Lodge

12:00 p.m.–1:15 p.m.

LUNCH & MEET OUR SENIOR GRAND WARDEN

Recharge over lunch while meeting the Senior Grand Warden.

1:20 p.m.–2:10 p.m.

BREAKOUT SESSIONS 3

- Managing Lodge Issues: Practical Problem-Solving for Masters
- ▲* Mentoring that Makes a Difference
- ◆● Strengthening the Craft: Retention and Member Engagement
- ◆ **SPECIAL** OUTREACH FOCUS
More Than a Home: The Complete Guide to Masonic Services
- ▼ Strategic Budgeting and Financial Stability: Lodge and Hall Association Planning
- ♥ Creating Experiences, Fellowship and Connections vs. Planning Events

2:20 p.m.–3:10 p.m.

BREAKOUT SESSIONS 4

- Fine Tune the Beehive: Running the Executive Committee
- ▲ Exploring Member Education: Program Options and Implementation
- ◆ **SPECIAL** OUTREACH FOCUS
Mobilizing Your Lodge: Building Effective Outreach Committees
- ▼● What's New in iMember: Focus on iMember Accounting
- * Ritual Readiness: Training for Excellence
- ♥ Risk Management in Events: Rules Governing Fundraisers and Alcohol

3:10 p.m.–3:25 p.m.

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. This is your chance to connect, ask questions, share stories, and learn firsthand from the next generation of Masonic leaders.

Coffee break sponsored by California Scottish Rite

3:25 p.m.–3:45 p.m.

THE KEYSTONE INITIATIVE: New Resources for Halls and the Insurance Captive

Our halls are at the heart of our lodges. Learn about and take advantage of new resources. 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)
- ▲ 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 GENERAL SESSIONS

CONTINUED

3:45 p.m.–3:55 p.m.

THE KEYSTONE INITIATIVE: Deepen Our Masonic Experience

Explore how we elevate the member journey and lodge engagement. 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.

4:05 p.m.–5:30 p.m.

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, discover how lodges can thrive when stated meetings are focused and the lodge offers meaningful Masonic education. See a demonstration of how stated meetings can be streamlined to strengthen the lodge experience.

5:30 p.m.–7:00 p.m.

PRE-FUNCTION LOBBY

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. Ask questions, share stories, and experience the full breadth of support and community that the Masonic Homes family brings to our fraternity.

Sponsored by the Masonic Homes of California

7:00 p.m.–9:00 p.m.

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

End the day on a high note with dinner, our deputy grand master, and our new Ye Olde Pin Swap. 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 around the state. It's a fun and meaningful way to share your lodge's identity, discover new designs, and build connections through the emblems we proudly wear.

SCHEDULE OF EVENTS

SUNDAY GENERAL SESSIONS

8:00 a.m.–8:30 a.m.

COFFEE CHAT

Start your final day with great conversation. This relaxed gathering sets the stage for the day and strengthens bonds before the closing sessions.

Coffee break sponsored by California Scottish Rite

8:30 a.m.–9:20 a.m.

BREAKOUT SESSIONS 5

- ◆ Inspiring Tomorrow: The New and Renewed Lodge Development Journey
- ▲ The Candidate Education Program: Coaching Entered Apprentices and Fellowcrafts
- ▼ Audit Preparation and Financial Reviews: Ensuring Compliance and Accountability
- Modern Tools for Lodge Management
- * Enhancing the Degree Experience: Music, Regalia, and Paraphernalia
- ♥ Community Engagement: Building Connections Beyond the Lodge

9:30 a.m.–10:20 a.m.

THE KEYSTONE INITIATIVE: Putting the Weekend's Tools to Work Your Lodge

A breakout session to start planning the work of your lodge.

10:30 a.m.–11:00 a.m.

LODGE CRAFT APP 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. Don't miss these demonstrations of the beta of this new tool.

11:00 a.m.–11:30 a.m.

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.

11:30 a.m.–12:00 p.m.

CLOSING

End the retreat with a celebration of what's been accomplished. Reflect on how small, meaningful changes—like a “1% improvement”—can lead to lasting transformations. Participate in a closing activity, celebrate the weekend's achievements, and share feedback to help shape future retreats.

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)

BREAKOUT SESSIONS

10:10 a.m.–11:00 a.m.
SATURDAY

■ Delegation for Success: Empowering Your Team

Understand the job duties of the lodge. Learn to delegate effectively, ensuring responsibilities are shared and your team is empowered. 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. Lead with purpose by inspiring action and fostering a shared vision that energizes your lodge. This session equips you with tools to build enthusiasm, strengthen teamwork, and create a culture of engagement rooted in Masonic values. Facilitate collaboration across the roles.

▲* The Symbolic and Ceremonial Significance of Rituals

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

Learn to establish a dedicated welcome committee that handles inquiries professionally and warmly. Gain tools to ensure emails, calls, and walk-ins are managed effectively, creating an inviting first impression for prospective members and setting the tone for a positive and engaging lodge experience. Develop confidence in engaging with prospects through meaningful conversations. 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

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. In this foundational session, we will explore how this program was built by Masons for Masons to ensure no brother falls through the cracks. We will discuss the vital partnership between your lodge and Masonic Outreach Services (MOS) and how you can serve as the primary liaison. You will leave with practical tools to help you fulfill this duty. Whether you are new to Lodge Outreach or looking to refresh your knowledge, this session connects the history of the program 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

Gain the confidence to protect your lodge and Hall Association by identifying risks and ensuring proper insurance coverage. 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, leaving with a clear understanding of how to strengthen their organization's risk management framework and ensure peace of mind.

● Welcoming New Members: Secrets of an Engaging Onboarding Process

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. Learn how to collaborate with officers to create mentorship opportunities that foster connection and growth.

11:10 a.m.–12:00 p.m.
SATURDAY

Special Breakouts of the Role of the Officers

Lead with purpose by understanding how your individual role helps the whole lodge thrive. This practical session will help you see how your daily actions contribute to the “beehive” of lodge life—where teamwork, shared responsibility, and steady effort build lasting success. You'll learn simple, hands-on ways to inspire others, strengthen collaboration, and create a lodge culture grounded in purpose and Masonic values.

■ Understanding the Role of the Master (and later Past Master) in the Beehive of the Lodge

Understand how 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.

▲ Understanding the Role of the Senior Warden and Junior Deacon in the Beehive of the Lodge

Explore how these roles guide members from first interest to lifelong engagement. Learn how each role builds on the last to create a meaningful member journey.

◆ Understanding the Role of the Junior Warden, Marshall, Senior Deacon, and Chaplain in the Beehive of the Lodge

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

▼ Understanding the Roles of the Treasurers (and their assistants) in the Beehive of the Lodge

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

● Understanding the Roles of the Secretaries (and their assistants) in the Beehive of the Lodge

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

* Understanding the Role of Officers Coaches, Musicians, and Tilers in the Beehive of the Lodge

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

♥ Understanding the Role of the Stewards in the Beehive of the Lodge

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

LEGEND SUGGESTED TRACKS FOR OFFICERS

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

BREAKOUT SESSIONS

CONTINUED

1:20 p.m.–2:10 p.m.

SATURDAY

■ Managing Lodge Issues: Practical Problem-Solving for Masters

Equip yourself to handle common lodge challenges with confidence. 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

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. Whether you're supporting a candidate, officer or an emerging leader, you'll leave with simple, actionable tools to help others grow with confidence and purpose.

◆● Strengthening the Craft: Retention and Member Engagement

Reframe the officers' role as key stewards of membership vitality. 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. Learn how to welcome sojourning Masons relocating from other states and create simple, repeatable practices that help them feel at home quickly. Gain tools for promoting autopayment of dues, improving continuity, and reducing administrative stress. Leave with strategies that strengthen belonging and equip secretaries to sustain a healthy, connected lodge.

◆ SPECIAL OUTREACH FOCUS

More Than a Home: The Complete Guide to Masonic Services

When a brother is in distress, knowing exactly what resources are available can change his life. This comprehensive overview moves beyond general knowledge and dives into the specific eligibility and scope of services provided by the Masonic Homes of California. We will unpack the full spectrum of support available, including: Residential Options, Masonic Outreach Services, and Emotional Wellness: You will leave this session equipped with the knowledge to navigate these programs confidently, ensuring you can connect members and their families with the services they need, when they need them.

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

Lead with purpose by understanding how your individual role helps the whole lodge thrive. This practical session will help you see how your daily actions contribute to the "beehive" of lodge life—where teamwork, shared responsibility, and steady effort build lasting success. You'll 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

Transform routine events into memorable experiences that resonate with members. 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.

2:20 p.m.–3:10 p.m.

SATURDAY

■ Fine Tune the Beehive: Running the Executive Committee

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

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

Effective outreach cannot be a one-man show. To ensure members and their families receive personalized attention without burning out lodge leadership, you need a team. This workshop focuses on the practical steps of forming and maintaining active Outreach committees, including Sunshine, Widows, and Member Retention committees. We will review specific strategies to get active participation, and shadowing opportunities that engage Entered Apprentices and Fellow Crafts early in their journey. Whether your lodge is already active in Lodge Outreach or starting from scratch, you will walk away with tangible resources and an action plan for building and sustaining Outreach in your lodge.

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

This session offers a guided walk-through of updates to iMember's, including a review of the new accounting tools. With the retirement of Intacct systems, mastering these tools is essential for effective financial management. Learn detailed steps to maintain accurate records, track income and expenses, and produce transparent financial reports.

* Ritual Readiness: Training for Excellence

Learn techniques to train officers for proficiency and confidence in their ritual roles. This session focuses on fostering a culture of ritual excellence, ensuring every officer is prepared to deliver impactful and precise degree work, contributing to the lodge's ceremonial success. 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

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.

LEGEND SUGGESTED TRACKS FOR OFFICERS

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

BREAKOUT SESSIONS

CONTINUED

8:30 a.m.–9:20 a.m.

SUNDAY

◆ Inspiring Tomorrow: The New and Renewed Lodge Development Journey

Rooted in the Keystone Initiative’s call to deepen our Masonic experience, this session highlights what it takes to create lodges that honor our past while building a meaningful future. Together, we’ll explore the journey of new and renewed lodges, the timeless virtues at their core, and how purpose-driven members can shape a lodge culture grounded in education, charity, mentorship, and true friendship. 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

Learn how to mentor Entered Apprentices and Fellowcrafts through their Masonic journey. 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

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. Leave equipped to streamline processes and enhance your lodge’s credibility.

● Modern Tools for Lodge Management

Discover digital tools that streamline lodge administration and enhance engagement. 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**

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

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.

LEGEND SUGGESTED TRACKS FOR OFFICERS

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

LEARNING LABS (TECHNOLOGY TRACK)

Hands-on, 15–20 minute workshops during breakout sessions 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.

SATURDAY

TRI-VALLEY 1

TIME / PLACE	TOPIC	DESCRIPTION
10:10–10:30 a.m.	Entering Bills in iMember	Step-by-step bill entry and payment: vendors, reimbursements, salaries, expense categories, and payments (check, ACH, online).
10:35–10:55 a.m.	Financial Reporting in iMember	Run key reports, enter budgets, and generate clear financial summaries for planning and transparency.
1:20–1:40 p.m.	Navigating Suspensions in iMember	Overview of Masonic requirements and how to process suspensions accurately in iMember.
1:45–1:55 p.m.	Bank Reconciliation	How to record donation, stated meeting receipts, and other income/receipts.
2:00–2:15 p.m.	Recording Non-Dues Receipts	Enter donations, meeting receipts, and other income with proper categorization and reporting.
2:20–2:35 p.m.	Entering Applications in iMember	Input candidate data, track status, and maintain accurate membership records.
2:40–2:55 p.m.	Membership Reporting in iMember	Generate reports on membership, status changes, and dues tracking for planning and compliance.
3:00–3:15 p.m.	Online Payments & Autopay	Manage online payments, enroll members, and track Autopay activity.

SUNDAY

TRI-VALLEY 1

TIME / PLACE	TOPIC	DESCRIPTION
8:30-8:45 am	Build Your Newsletter in iMember	Create, format, and distribute newsletters with images and targeted mailing lists.
8:50-9:05 a.m.	Lodge or Hall Website Setup	Overview of templates, required content, and steps to launch with staff support.
9:10-9:20 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?

SATURDAY NOTES

What are my top three takeaways from the sessions I attended?

What have I learned that will make my job easier or more fulfilling?

What will I do with this information when I leave 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?



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