

20
26



 Masons
of California

LEADERSHIP RETREATS

Strengthening the Craft: Retention and Member Engagement

MichaelDavid Smith
Masons of California

 Masons
of California

Agenda

- Membership Retention Committee
- Centralized SNPD – Grand Lodge Outreach
- Membership Restoration Campaign



Roles and Responsibilities: Membership Retention Committee





**Inspiring our craft by redefining and
streamlining officer roles**

Roles and Responsibilities: Membership Retention Committee

Purpose:

1. Acts as a liaison between members and the Lodge to prevent suspensions due to non-payment of dues.
2. Offers support, solutions, and resources for members facing financial hardship.
3. Strengthen Lodge relationships using proactive communication.

Key Responsibilities:

1. **Contact delinquent members** to keep or bring them into good standing.
2. **Resolve payment issues** or escalate hardship cases to the Charity Committee for dues remission.
3. **Maintain confidentiality** and provide support with empathy and patience.

Retention Committee: Outreach Process

Getting Started:

1. Member Retention Committee appointed annually by Lodge Master.
2. Members should be selected based on empathy and dedication.

Steps for Outreach:

1. Access delinquent members list via Lodge Secretary.
2. Divide the list among committee members.
3. Contact the members via phone, email, and text. Sample scripts provided in Membership Retention Committee Guide.
4. Verify and update contact details with Lodge Secretary as applicable.
5. Refer members with financial hardship to Lodge Charity Committee for dues remission consideration

Retention Committee: Best Practices

- ✓ Maintain and assure confidentiality, show empathy for life circumstances. Do not start the conversation with discussing finances or dues.
- ✓ Confirm the members contact information.
- ✓ Focus on the Brother and their well-being, not just the delinquent dues.
- ✓ Discuss payment options.
- ✓ Always follow-up with phone conversations via email.

Retention Committee: Additional Resources

- **Balance Discrepancies:** Refer member to Lodge Secretary
- **Financial Hardship:** Refer to Lodge Charity Committee for dues remission consideration.
- **Online payment issues:** Member Services, memberservices@freemason.org



Questions



Answers



Suspension for Non-Payment of Dues (SNPD)



Conditions to Qualify for Suspension for Non-payment of Dues



Member has not paid dues for over 12 months



No valid reasons provided

Inability to pay
Mentally incompetent
Resident of Masonic Homes of California



Member Retention Committee unsuccessful in outreach



Secretary records notice of intent to suspend in iMember

Suspension for Non-payment of Dues Process



Secretary gives notification of pending SNPD by: Entering into iMember



Grand Secretary reaches out on behalf of Lodge



Notification provided to the member for 60 days



Master can declare the member suspended














How to Suspend a Member



When a member is arrears in their dues for 12 or more months, the Lodge can notice of intent to suspend the member for non-payment of dues.



Note: these names SHOULD be read aloud

 Feed	 Events	 My Profile	 Virtual Card	 Education	 Grand Lodge
 Grand Lodge Recognition	 Member Search	 Find Meetings	 Lodge Locator	 Resources	 Rituals
 Leadership Retreats - REGISTER NOW!					

Lodge: Prometheus No. 851

\$35.00


Actions

2




Feed


1




Events




My Profile




Virtual Card




Education




Grand Lodge




Grand Lodge Recognition




Member Search




Find Meetings



Lodge Locator



Resources



Rituals



Leadership Retreats - REGISTER NOW!

Lodge: Prometheus No. 851

\$35.00

Actions



PROMETHEUS
LODGE NO. 851

DASHBOARD >>



- Dashboard >
- Members >
- Spouses/Widows >
- Other Contacts >
- Newsletters (formerly Posts) >
- Meetings & Events >
- Reports & Labels >
- List Builder (formerly Report Builders) >
- Tasks >
- Resources & Forms >
- Back to Top ^
- Expand Footer ^

Tasks	Type	Due	Status
~ No tasks ~			

Member Workflows	Mem. Ct.
Prospect	10

Member Pipeline	Mem. Ct.
Entered Apprentice	3
Master Mason	38

Recap 07/01/2023 to 06/30/2024		Mem Ct.
Total Gains		1
Degree - Raised - MM	1	
Reinstated	0	
Transfer In	0	
Dropped-NPD Primary Lodge	0	
Transfer Out	0	
Affiliated	0	
Total Losses		-1

Lodge Operations

- Dues Verification
- Audit Report

Dues Summary

Member Engagement

Tip: Click on chart to download an Excel report for each group.

PROMETHEUS
LODGE NO. 851

Dashboard >
Members >
Spouses/Widows >
Other Contacts >
Newsletters (formerly Posts) >
Meetings & Events >
Reports & Labels >
List Builder (formerly Report Builders) >
Tasks >
Resources & Forms >

Back to Top ^
Expand Footer ^

DASHBOARD >> [User Icon] [Add User Icon] [List Icon]

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Total Losses	-1

Lodge Operations
Dues Verification
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Dues Summary

Member Engagement

Tip: Click on chart to download an Excel report for each group.



MEMBERS >> +


* The list below includes all members in status Inquiry, Applicant, Entered Apprentice, Fellowcraft, Master Mason

Home/Primary P Plural D Dual @ Email M Mobile Phone A Address + Member Portal Registration

- Dashboard >
- Members ^
 - Advanced Search >
 - Inactive Members >
- Spouses/Widows >
- Other Contacts >
- Newsletters (formerly Posts) >
- Meetings & Events >
- Reports & Labels >
- List Builder (formerly Report Builders) >
- Back to Top ^
- Expand Footer ^

Search member in the list by name or member number...

Name	Mem #	Status	Yrs of Service	Dues Class	@	M	A	+
Ray, Todd Darnell	380161	Entered Apprentice		🏠 - Regular	✓	✓	✓	✓
Rees, Charles Frank	396152	Entered Apprentice		🏠 - Regular	✓	✓	✓	✓
Sinclair, Alexander James	396852	Entered Apprentice		🏠 - Regular	✓	✓	✓	✓
Acton-Maher, Richard Alexander	319253	Master Mason	18.78	🏠 - Regular	✓	✓	✓	✓
Bariani, Emanuele	381289	Master Mason	0.3	🏠 - Regular	✓	✓	✓	✓
Borunda, Hiram	324139	Master Mason	14.96	P - Regular	✓	✗	✓	✓
Branham, Eryc Keith	220047	Master Mason	13.5	🏠 - Regular	✓	✓	✓	✓
Casalou, Allan Lesley	135675	Master Mason	33.18	P - Regular	✓	✓	✓	✓
Craddock, Patrick Carter	361149	Master Mason	36.17	🏠 - Regular	✓	✓	✓	✓
Drum, George Spieker	330778	Master Mason	12.83	🏠 - Regular	✓	✗	✓	✓
Emerson, David Tyler	319157	Master Mason	34.52	🏠 - Regular	✓	✓	✓	✓
Erdogan, Emre	346279	Master Mason	13.88	🏠 - Regular	✓	✓	✓	✓
Giannini, David Paul	217318	Master Mason	16.94	🏠 - Regular	✓	✓	✓	✓
Gill, Noor Sunraj	365555	Master Mason	5.63	P - Regular	✓	✗	✓	✓
Grose, Keith Michael	346499	Master Mason	6.85	🏠 - Regular	✓	✓	✓	✓
Haines, Robert Curran	320256	Master Mason	15.3	P - Regular	✓	✓	✓	✗

 **Masons of California**

PROMETHEUS
LODGE NO. 851

Dashboard >

Members ^

Advanced Search >

Inactive Members >

Spouses/Widows >

Other Contacts >

Newsletters (formerly Posts) >


Meetings & Events >

Reports & Labels >

List Builder (formerly Report Builders) >

Back to Top ^

Expand Footer ^

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- MASTER MASON
- General >
- Demographics >
- Photos >
- Memberships >
- Life Memberships >
- Spouse/Partner / Other Contacts >
- History >
- Offices >
- Preferences >
- Notes >
- Documents >
- Back to Top ^
- Expand Footer ^

Personal Information [Update Personal Information](#)

Birth Date
09/03/1985 --> 39.4 Years Old

No Photo

[Update Profile Picture](#)

Occupation
Vice President - Technology -

Years of Service
Date Raised : 10/13/2018
Years since raising: 6.29
Time Missed: 0.0
Total Years of Service: **6.29**
Fifty Year Date: 10/13/2068

Prometheus No.851

Active - Regular



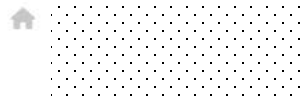
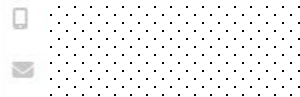
Balance -\$1,680.00

Status Change

[Print 2024 Dues Card](#)

Contact Information [Update Contact Info](#) | [Email Registration Link](#)

Preferred Contact Method Not Set



Directions **VERIFIED**

United States of America

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

Contact Information Comments

Updated from NCOA result on 3-02-2021



- MASTER MASON
- General >
- Demographics >
- Photos >
- Memberships >
- Life Memberships >
- Spouse/Partner / Other Contacts >
- History >
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Status Change

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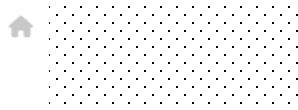
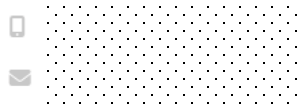
Update Profile Picture

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Contact Information [Update Contact Info](#) | [Email Registration Link](#)

Preferred Contact Method Not Set



Directions VERIFIED

United States of America

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Contact Information Comments
Updated from NCOA result on 3-02-2021

Prometheus No.851
Active - Regular



Balance -\$1,680.00

Status Change

- Demit
- Notice of SNPD
- NPD
- Suspend for UMC
- Expel
- Report as Deceased

Print 2024 Dues Card

Masons of California

MASTER MASON

- General >
- Demographics >
- Photos >
- Memberships >
- Life Memberships >
- Spouse/Partner / Other Contacts >
- History >
- Offices >
- Preferences >
- Notes >
- Documents >

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Expand Footer ^

Personal Information Update Personal Information

Birth Date
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Occupation
Vice President - Technology -

Years of Service
Date Raised : 10/13/2018
Years since raising: 6.29
Time Missed: 0.0
Total Years of Service: **6.29**
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Contact Information Update Contact Info | Email Registration Link

Preferred Contact Method Not Set

United States of America

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Contact Information Comments
Updated from NCOA result on 3-02-2021

Prometheus No.851
Active - Regular

Balance -\$1,680.00

Status Change

- Demit
- Notice of SNPD**
- NPD
- Suspend for UMC
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- Report as Deceased

Print 2024 Dues Card

Masons of California

Personal Information [Update Personal Information](#)

Birth Date
09/03/1985 --> 39.4 Years Old

Occupation
Vice President - Technology

Years of Service
 Member Age = 39.4
 Years of Service = 6.29
 Date Raised : 10/13/2011
 Years since raising: 6.29
 80/120 Rule Applies?= No
 Time Missed: 0.0
 Required Waiting Period = 30 Days
 Total Years of Service = 6.29
 Fifty Year Date: 10/13/2011

Update Profile Picture

Create Notice of Intent to Suspend for Non-payment of Dues

* Date of notice of intent to suspend (yyyy-mm-dd)

Comments

Save Notice

Prometheus No.851
Active - Regular

Balance **-\$1,680.00**

Status Change

[Print 2024 Dues Card](#)

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

Contact Information Comments
Updated from NCOA result on 3-02-2021

Masons of California

Personal Information Update Personal Information

Birth Date
09/03/1985 --> 39.4 Years Old

Occupation
Vice President - Technology

Years of Service
Member Age = 39.4
Date Raised : 10/13/2011 Years of Service = 6.29
Years since raising: 6.29 80/120 Rule Applies?= No
Time Missed: 0.0 Required Waiting Period = 30 Days
Total Years of Service = 6.29
Fifty Year Date: 10/13/2011 * Date of notice of intent to suspend (yyyy mm dd)

Create Notice of Intent to Suspend for Non-payment of Dues

2025-01-28

Save Notice

Prometheus No.851
Active - Regular

Balance -\$1,680.00

Status Change

- Demit
- Notice of SNPD
- NPD
- Suspend for UMC
- Expel
- Report as Deceased

Print 2024 Dues Card

4414 Old Sand Rd
Schuyler, VA 22969-1629
Alameda County
United States of America

Mark as Undeliverable
Manually Override Address

Contact Information Comments
Updated from NCOA result on 3-02-2021

Masons of California

Personal Information Update Personal Information

Birth Date: 09/03/1985 --> 39.4 Years Old

Occupation: Vice President - Technology

Years of Service: Member Age = 39.4

Date Raised: 10/13/2000

Years since raising: 24.0

Time Missed: 0.0 days

Total Years of Service: 6.29

Fifty Year Date: 10/13/2050

Create Notice of Intent to Suspend for Non-payment of Dues

80/120 Rule Applies?= No

* Date of notice of intent to suspend (yyyy-mm-dd)

2025-01-28

Comments

Save Notice

Prometheus No.851
Active - Regular

Balance: -\$1,680.00

Status Change

- Demit
- Notice of SNPD
- NPD
- Suspend for UMC
- Expel
- Report as Deceased

Print 2024 Dues Card

Masons of California

Personal Information Update Personal Information

Birth Date
09/03/1985 --> 39.4 Years Old

Occupation
Vice President - Technology

Years of Service
Member Age = 39.4
Date Raised : 10/13/2011 Years of Service = 6.29
Years since raising: 6.29 80/120 Rule Applies?= No
Time Missed: 0.0 Required Waiting Period = 30 Days
Total Years of Service = 6.29
Fifty Year Date: 10/13/2061

Contact Information

Preferred Contact Method

Comments

Save Notice

Prometheus No.851
Active - Regular

Balance -\$1,680.00

Status Change

- Demit
- Notice of SNPD
- NPD
- Suspend for UMC
- Expel
- Report as Deceased

Print 2024 Dues Card

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Create Notice of Intent to Suspend for Non-payment of Dues

Member Age = 39.4
Years of Service = 6.29
80/120 Rule Applies?= No
Required Waiting Period = 30 Days

* Date of notice of intent to suspend (yyyy-mm-dd)
2025-01-28

Comments

Save Notice

Masons of California

Personal Information Update Personal Information

Birth Date
09/03/1985 --> 39.4 Years Old

Occupation
Vice President - Technology

Years of Service
Member Age = 39.4
Years of Service = 6.29
Date Raised : 10/13/2019
Years since raising: 6.29
80/120 Rule Applies?= No
Time Missed: 0.0
Required Waiting Period = 30 Days
Total Years of Service = 6.29
Fifty Year Date: 10/13/2080

Update Profile Picture

Create Notice of Intent to Suspend for Non-payment of Dues

* Date of notice of intent to suspend (yyyy-mm-dd)
2025-01-28

Comments

Save Notice

Prometheus No.851
Active - Regular

Balance - \$1,680.00

Status Change

- Demit
- Notice of SNPD
- NPD
- Suspend for UMC
- Expel
- Report as Deceased

Print 2024 Dues Card

Mark as Undeliverable
Manually Override Address

Contact Information Comments
Updated from NCOA result on 3-02-2021

Grand Secretary Outreach



Perform Lost Member Search on the member

Update contact information

- Address
- Email
- Phone

Update deceased date (if applicable)

***75% of Members have required
updates to their contact information**



Weekly outreach by Grand Secretary for 60 days

Print mail

Electronic mail

Text messaging

Phone calls

Member Responses

Time received: **4/2/2026 7:49:22 PM EST**

Response text:

Sorry I live in Texas now

Time received: **4/2/2026 6:43:49 PM EST**

Response text:

I'm letting my membership expire. Thanks

Time received: **4/2/2026 6:45:06 PM EST**

Response text:

I can't afford them.

Time received: **4/2/2026 6:38:15 PM EST**

Response text:

I demited years ago once you raised the dues out of my comfortable range. I've contacted you several times over the years. I'm disabled and on a social security fixed income.

Member Responses

Time received: 4/2/2026 6:47:55 PM EST

Response text:

I've replied to those emails multiple times and have not received any responses. I am a member of the lodge and paid the lifetime membership fee years ago

Time received: 4/2/2026 7:06:17 PM EST

Response text:

I asked for a demit a long time ago

Time received: 4/2/2026 9:29:43 PM EST

Response text:

I haven't been to lodge in almost 40 years and I can't think of a good reason to go. My home lodge is in some 400 plus miles from home. You folks do good work and I wish you well but I've sent in my last dues.

**How to suspend members after the
period of
Grand Secretary outreach**

1 Click "Intent To Snpd"

DASHBOARD >>

Tasks	Type	Due
~ No tasks ~		

Member Workflows	Mem Ct.
Prospect	4
Applicant	4
Intent To Snpd	6
Eligible for suspension	3

Member Pipeline	Mem. Ct.
Entered Apprentice	6
Fellowcraft	3
Master Mason	74

Recap 07/01/2025 to date	Mem Ct.
Total Gains	4

Lodge Operations

- Dues Verification
- Audit Report

Dues Summary

A pie chart illustrating the distribution of dues status among members. The chart is divided into three segments: a green segment labeled 'exempt', a yellow segment labeled 'endowed', and a red segment labeled 'owing_dues'.

2 Click Member Eligible for Suspension

The screenshot shows a mobile application interface. On the left is a dark sidebar with navigation icons (home, dollar sign, group of people, folder, settings, help) and two menu items: 'Download EXCEL Report' and 'Send Dues Notice Emails'. The main content area has a title 'INTENT TO SNPD' with a back arrow and a forward arrow. Below the title is a paragraph of text explaining the suspension process. Underneath is a search bar with the placeholder text 'Search member in the list by name or member number...'. At the bottom is a table with columns for 'Mem #', 'Name', 'Date Entered', and 'Last Activity & Status'. The 'Name' column in the first row is highlighted with an orange box.

INTENT TO SNPD >>

The suspension process will be unlocked 60 days after the Notice of Intent to Suspend is created and will remain in effect for 6 months, members will automatically return to active status if no suspension is executed. A new Notice of Intent to Suspend can be initiated at any time during the suspension process.

Search member in the list by name or member number...

Mem #	Name	Date Entered	Last Activity & Status
		12/19/2025	→ Outstanding Balance: \$871.75
		12/06/2022	→ Outstanding Balance: \$230.00
		12/19/2025	→ Outstanding Balance: \$569.25
		12/04/2024	→ Outstanding Balance: \$965.25
		12/04/2024	→ Outstanding Balance: \$871.75
		12/19/2025	→ Outstanding Balance: \$871.75

3

Click Status Change

The screenshot shows a user profile page with a light blue header. The main content is divided into two columns. The left column contains sections for 'Personal Information' (with an 'Update Personal Information' link), 'Contact Info' (with 'Update Contact Info' and 'Email Registration Link' links), and 'Payment Method' (with 'Not Set'). The right column contains 'Other Memberships >' with a 'HOME LOOSE' badge, 'Intent to SNPD - Regular', a 'Balance' of '-\$871.75', a 'Status Change' dropdown menu (highlighted with an orange box), and a 'Print 2025 Dues Card' button. A 'Directions' button with a 'VERIFIED' badge is also visible at the bottom of the left column.

4

Click "Suspend for NPD UNLOCKED"

The screenshot displays a user profile page with several sections:

- Update Personal Information:** Includes a "No Photo" label and an "Update Profile Picture" button.
- Update Contact Info | Email Registration Link:** A section for contact details.
- Method Not Set:** A section for payment or subscription methods.
- Other Memberships >:** A sidebar menu with a "HOME LODGE" ribbon. It lists "Intent to SNPD - Regular" with a balance of **-\$871.75**. Below this is a "Status Change" dropdown menu with the following options:
 - Withdrawn
 - Notice of Intent to SNPD
 - Suspend for NPD UNLOCKED - 59 days remaining** (highlighted with a red border)
 - Suspend for UMC
 - Expel
 - Report as Deceased
- Print 2025 Dues Card:** A button at the bottom of the sidebar.

5 Click "Suspend"

The screenshot shows a user interface for managing a member's status. On the left is a dark sidebar with a 'FELLOWCRAFT' header and a list of menu items: General, Demographics, Photos, Memberships, Life Memberships, Spouse/Partner / Other Contacts, History, Offices, and Preferences. The main content area is titled 'Contact Information' and contains a form for suspending a member. The form has a title 'Suspend for Non-payment of Dues' and a sub-header 'Date of Notice of Intent to Suspend: 12/19/2025'. Below this, there is explanatory text: 'The required waiting period has elapsed and you may now suspend the member using the form below.' and a clock icon with the text '59 days remaining until the suspension is locked, and a new Notice of Intent to Suspend is required.' The form includes a date input field with a calendar icon, currently showing '04-21-2026'. Below the date field is a 'Comments' text area. At the bottom of the form is a dark red button labeled 'Suspend', which is highlighted with an orange rectangular box. The background of the form is semi-transparent, showing the underlying 'Contact Information' page with fields for name, address, and phone number.



Questions



Answers



Membership Restoration Campaign



Campaign Participation



Lodges which participated in the previous campaigns are automatically enrolled for ensuing years



Lodges which have not previously participated must adopt the resolution by a 2/3 vote and provide a list of those members the lodge authorizes for participation

Existing Lodges

May review and edit the members of their lodge in the campaign by contacting Member Services

May add new members to the campaign by a 2/3 vote and providing a list to Member Services

New Lodges



MUST ADOPT THE RESOLUTION BY 2/3 OF THE MEMBERS PRESENT AT THE MEETING WHERE IT IS DISCUSSED. NO PREVIOUS NOTICE MUST BE CIRCULATED PREVIOUS TO THE VOTE.



RESOLUTION AUTHORIZES GRAND LODGE TO REACH OUT TO INDICATED BRETHREN AND OFFER RESTORATION FOR \$100

Restoration Process

- Communication to SNPD member
 - By email (if in member record) and by physical mail
 - Sent weekly following enrollment in the campaign
- Member restoration Payments
 - By credit card on iMember
 - Emails have auto registration feature for unregistered members
 - By check to Grand Lodge office
- Dues card available as soon as payment recorded (immediately if by credit card)
- Notice to Lodge as soon as payment recorded via automated email (immediately if by credit card)



Questions



Answers