



Members' Pathway Training for Lodges Implementing the Members' Pathway (Part Two: Steps 7-11)

TRAINERS' MANUAL

INTRODUCTION

This training package is written for the use of Provinces, to offer training to Lodge members in the Members' Pathway. It is the second part of a two-part training programme, "Implementing the Members' Pathway". Part one covers Steps 1-6 and part two covers Steps 7-11. A separate third package covers Interviewing Techniques for members of Lodge Interview Panels.

The package is written as a Trainer's Manual for use by capable and experienced trainers (see below).

The purpose of the training is to help Lodge members use Steps 7-11 of the Members' Pathway; specifically to help them mentor, support and retain new members.

The target audience is all members of Lodges who wish to use the Members' Pathway. It is especially relevant to Lodge Mentors, Lodge Membership Officers (LMOs), Secretaries and other key stakeholders.

LEARNING OUTCOMES

By the end of this workshop, participants will be able to:

1. Describe the Members' Pathway, its rationale, structure and the different roles and responsibilities involved
2. Agree with Lodge members the division of tasks and activities across the Members' Pathway
3. Identify, brief, prepare and support suitable Lodge members to be Personal Mentors for each candidate and new member
4. Implement the Members' Pathway and planned mentoring within the Lodge
5. Build a supportive mentoring relationship with a candidate / new member (Step 7)
6. Identify a member's individual needs for information, personal contact and support and agree with others how the Lodge will respond to those needs (Step 8)
7. Plan for and provide regular support and encouragement appropriate to the individual needs of the new member, from Initiation onwards (Step 8)
8. Promote the Royal Arch and encourage Master Masons to join a Royal Arch Chapter suitable for them when they are ready to do so (Step 9)
9. Monitor and review an individual member's attendance, contribution and progress in, and satisfaction with, the Lodge and with Freemasonry (Steps 10)
10. Recognise early warning signs of potential resignations and provide tailored support to dissatisfied members and those in need (Step 11)
11. Monitor and review the success of Mentoring and the Members' Pathway within the Lodge
12. Ensure record keeping and administrative activities comply with data protection requirements and with Provincial and UGLE rules and procedures.

DELIVERY OF THE TRAINING PROGRAMME

Learning outcome 1 is to be met by participants reading, as a minimum, the Members' Pathway Steps, the Step Guides and all support documents referenced in Steps 7-11, including the role profiles for Lodge Membership Officer (LMO) and Lodge Mentor. These may be found at b.UGLE.org.uk. Participants will need to have access to the full documents and be given the required password.

The remaining learning outcomes cover practical and social skills and are to be met through completing a live workshop, delivered locally by Provincial trainers. This package includes the trainers' notes and visual aids for a three and a half hour workshop involving a minimum of 4 and a maximum of 15 participants.

Metropolitan / Provincial / District Grand Lodges may wish to issue a certificate to recognise the completed training. They may also choose to award a locally designed pin badge or other token of recognition. A local record should be made of their participation.

Appendix A is a checklist of resources and materials for trainers running the live workshop. Appendix B provides templates for communications to brethren who wish to participate in the training.

QUALIFICATIONS OF TRAINERS

This training package has been designed for the use of trainers who are skilled and experienced in facilitating participative learning events using group exercises, case study, discussion and feedback. It will not be sufficient to be an effective presenter.

Such trainers are likely to have had some formal training and considerable experience. They may have worked in an organisation's training department or as a volunteer trainer in a large service delivery voluntary organisation (eg, a first aid organisation, Relate, the Samaritans, a large youth organisation, etc).

It is likely that each Metropolitan / Provincial / District Grand Lodge will have some members who have such skills and experience. They may need to be identified if not already known. Such brethren might not hold high rank in the Craft, and will not require this to deliver the training workshop. It may be that a senior member of the Province attends to support the trainer running the event.

Although the workshop is written so that a single trainer could run it on their own, additional trainers can be involved. They can share the delivery of sessions and / or support groups of participants during the practical sessions.

We recommend that the training workshop be delivered to groups of people from more than one Lodge. We do not recommend that Lodges organise training for themselves, even if they have qualified trainers in their membership.

BEFORE THE WORKSHOP

Participants should be asked to complete the following activities before attending the workshop. All who attend will be assumed to have completed these activities. There will not be any time available during the workshop to help any participant who has not completed these activities or to cover the learning involved.

1. Read the Members' Pathway Steps and Step Guides (see b.UGLE.org.uk)

2. Read all support documents referenced in Steps 7-11, including the role profiles for Lodge Mentor and Lodge Membership Officer (LMO).

WORKSHOP PROGRAMME

Session times are for illustration purposes only and may be adapted to suit local needs.

The time allowed for the workshop is tight but can be achieved with good time management and skilled facilitation. Trainers will need to maintain a focus on the workshop outcomes and manage distractions, such as anecdotes or wider questions and issues. It may be necessary to note such issues and return to them in question and answer sessions or on other occasions.

The timings are for the benefit of the trainers. We suggest that - other than the start, break and finish times - the session times are not communicated to participants. Doing so can limit flexibility and create the perception that the session is not being run to plan.

<i>Time</i>	<i>Session title</i>	<i>Time allowed</i>	<i>Learning outcomes</i>
17.45	Arrival, registration, refreshments	15 mins	
18.00	Welcome & purpose	10 mins	
18.10	Planned mentoring	80 mins	4, 5, 6, 7, 9, 10
19.30	Break	15 mins	
19.45	Introducing the Royal Arch	15 mins	8
20.00	Monitoring and administration	40 mins	11, 12
20.40	Implementing in our Lodge	40 mins	2, 3
21.20	Review & close	10 mins	
21.30	End of workshop		

WORKSHOP SESSION PLANS

<i>Time</i>	<i>Method</i>	<i>Trainer's notes</i>	<i>Support Materials</i>
17.45		Arrange for a helper to greet participants and to register them, issue name badges, direct to refreshments and then to seating.	Attendance sheet. Name badges. Refreshments.
18.00	Plenary - welcome & purpose	<p>The trainer welcomes all participants.</p> <p>Explain the context of the training session:</p> <ul style="list-style-type: none"> - the introduction of the Members' Pathway - key roles of Lodge Membership Officer, Mentor and Secretary - need for coordination within the Lodge. <p>Outline the aim of & learning outcomes for the training session.</p> <p>Remind participants that they should already have completed the pre-workshop activities.</p> <p>Outline the programme / sessions.</p> <p>Explain the training methods to be used (i.e. some input, discussion, group activities and exercises) and explain that participants will be expected to take part and to contribute.</p> <p>Brief them on domestic matters (e.g. fire escape, toilets, refreshments, phones, etc).</p> <p>Invite & briefly address any questions.</p>	<p>Visual aids (VAs) covering</p> <ul style="list-style-type: none"> - Welcome / title (1) - Outcomes (2) - Programme (3) <p>Copies of reading & distance learning materials</p>
18.10	Planned mentoring	<p>Trainer introduces session with the comment that the Members' Pathway incorporates the best of mentoring practice developed over the years.</p> <p>Trainer forms participants into small groups, each made up of 3 or 4 participants from different Lodges.</p> <p>Groups have 10 minutes to discuss their experience of mentoring in their Lodges, whether or not it was planned and how successful it was. No feedback.</p> <p>Trainer plenary input to outline</p> <ul style="list-style-type: none"> - when properly implemented, mentoring increases satisfaction and prevents resignations - good mentoring does not just happen, it has to be planned - planned mentoring puts the member and his needs at the middle of mentoring - involves 4-stage planning loop - stage 1 – identify the member's unique needs for (a) information, (b) personal contact and (c) support and encouragement - stage 2 – plan and agree how those needs are to be met in the Lodge - stage 3 – carry out the plan - stage 4 – review the needs, plan and its implementation 	<p>Session title – VA 4</p> <p>VA 5 – discussion points</p> <p>VA 6 – 4 stage model</p>

		<ul style="list-style-type: none"> - repeat from stage 1 onwards <p>Trainer issues part one of case studies (appendix C, a different case for each group) and briefs for case study task as follows:</p> <ul style="list-style-type: none"> - review the case to identify and list the individual needs of the member described for (a) information, (b) personal contact and (c) support and encouragement - prepare a plan to detail how the personal mentor and others in the Lodge will address and support the needs identified - describe how the Lodge will monitor and review the mentoring plan and an individual's attendance, contribution, progress and satisfaction <p>Trainer allows 20 minutes for this task.</p> <p>When each group completes the task, or at the expiry of the time allowed, trainer issues part two:</p> <ul style="list-style-type: none"> - identify and list the early warning signs of dissatisfaction - decide what tailored support a Lodge can provide to resolve any issues or meet a dissatisfied member's needs. <p>Trainer allows 15 minutes for this task.</p> <p>Groups write up all work on one flip chart sheet per group.</p> <p>Trainer conducts plenary review as follows</p> <ul style="list-style-type: none"> - groups display their sheets (on walls or floor) - all participants spend time viewing each group's work - trainer led Q&A. <p>Trainer summarises key points, emphasising:</p> <ul style="list-style-type: none"> - recognising and responding to unique individual needs rather than adopting standards means of "progressing" new members - need for a planned approach that is followed by all Lodge officers and reviewed - watch out for early warning signs of dissatisfaction and take early action to address needs. 	<p>VA 7 - Task brief</p> <p>VA 8 – Task brief</p>
19.30	Break		
19.45	Introducing the Royal Arch	<p>Trainer input based around Step 9</p> <p>Q&A</p>	<p>Session title – VA 9</p> <p>VA 10 - Key points</p>
20.00	Monitoring and administration	<p>Trainer forms participants into groups made up of people from same Lodge. If more than one participant is the sole attendee from their Lodge they can work together.</p> <p>Brief groups for the following tasks:</p> <ol style="list-style-type: none"> 1. Decide how you will monitor and review the success of mentoring and the Members' Pathway within the Lodge. (15 mins) 2. Create a checklist of all the administrative activities, including data protection and UGLE / Provincial 	<p>Session title – VA 11</p> <p>VA 12 – task brief</p>

		<p>requirements, for the Lodge to use through Steps 7-11, detailing who will complete which activity. (15 mins)</p> <p>Trainer leads brief review of first task asking for an example from each group and then of second task by asking groups to confirm whether they have completed their checklists or whether they will need to do more after the workshop.</p>	
20.40	Forward planning	<p>Using the same groups as above, the trainer briefs for the following tasks:</p> <p>Discuss:</p> <ol style="list-style-type: none"> 1. what are the various tasks and activities to be done in our Lodge to introduce planned mentoring and other actions from Steps 7-11 2. who are the best members to undertake each of these tasks and activities 3. who can we ask to be the Personal Mentors for each of our candidates, new members and Master Masons 4. how will we brief and support Personal Mentors in the Lodge? 5. what other steps do we need to take in our Lodge (and when). <p>Write up your ideas on a flip chart and display the flip chart at the end of the activity.</p> <p>Trainer asks all participants to walk around the different flip charts and to note new ideas.</p> <p>Lodge members take their own flip charts with them at the end of the workshop.</p>	<p>Session title – VA 13</p> <p>VA 14 - Task brief</p> <p>Flip chart paper & marker pens</p>
21.20	Summary and close	<p>Trainer briefly summarise the workshop, recapping its purpose and objectives.</p> <p>If time allows he may address remaining questions or arrange to discuss following the workshop.</p> <p>If attendance certificates are to be presented, this is the time to do so.</p> <p>Trainer thanks all who attended and any who assisted, including the venue.</p> <p>Trainer finishes with positive, forward looking remarks and with a request to keep the Province informed and to seek help and assistance when needed.</p>	<p>Session title – VA 15</p> <p>VA 16 Thank you</p>

REVIEW & EVALUATION

As with all training sessions, this programme should be reviewed and evaluated at intervals and the results used to make improvements. The following is suggested as good practice.

1. By the trainers running the workshop.

- Reviewing the verbal and non-verbal feedback received during the delivery of the workshop
- Reviewing the quality of answers given during the workshop
- Producing summary reports for their Metropolitan / Provincial / District Grand Lodge
- Using follow-up feedback gathered after participants complete the workshop
- By working with their Metropolitan / Provincial / District Grand Lodges in reviewing the impact on the change in levels of Initiations, short-term member retention and longer term growth.

2. By Metropolitan / Provincial / District Grand Lodges commissioning the training.

- Requesting trainers to supply attendance lists and summary reports
- Monitoring participant feedback immediately following and some while after completing the workshop
- Asking Visiting / Liaison Officers to report on changes or improvements to Lodge practices
- Monitoring changes in numbers of Initiations, ratio of interviews to Initiations, short-term member retention and longer term growth.

3. By UGLE and the Improvement Delivery Group.

- Informal feedback from Metropolitan / Provincial / District Grand Masters
- Monitoring changes in numbers of Initiations, short-term member retention and longer term growth
- Commissioning revisions to the training package in the light of the above.

APPENDIX A: TRAINER'S CHECKLIST OF PLANS, MATERIALS & RESOURCES

Trainer's Checklist

The following information is given to help trainers prepare to deliver the workshop. This preparatory work will help trainers elaborate and clarify points raised within the training and generally enhance trainers' confidence and competence to deliver the training.

Before the day

- book venue and facilities
- invite participants using template letter or local version
- arrange refreshments
- recruit & brief support trainers
- allow sufficient preparation time before delivering the course to familiarise yourself with the session plans, corresponding visual aids, handouts and exercises
- obtain resources listed below
- reproduce participant materials listed below

On the day

- arrive early to setup the training facility
- check all materials and equipment
- run the workshop according to this pack
- be flexible during sessions but keep to break and end times

After the day

- review with trainers – what went well, what difficulties occurred, how could it be improved
- feedback trainers' review to your Provincial Membership Officer & Provincial Grand Mentor
- produce summary of participants' feedback
- complete any follow up actions agreed with trainers and participants

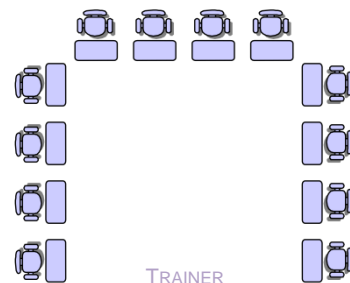
Materials & resources

- Large meeting room, laid out with chairs and tables for training (max 15 participants plus trainers).

It is essential to have sufficient space for people to move and to conduct the exercises.

The horse-show layout (as illustrated) is regularly used by trainers, as it gives a good mix of sitting and listening and interaction between the members. Walking into the 'hole' in the middle of the desks is a good way to command attention as a trainer. This layout encourages participation by allowing eye contact between the trainer and participants and works well when participants are involved in group discussions.

- Computer, projector, screen, cables
- PowerPoint file with slides
- Flip chart and markers for trainers
- Blank flip chart sheets and markers for participants
- Paper and pens for participants
- Timer for practical sessions
- Attendance sheets
- Name badges
- Refreshments on arrival and at break
- Copies of Members' Pathway Steps, Step Guides and support documents
- Copies of Participant handouts and exercises



APPENDIX B: COMMUNICATIONS TO PARTICIPANTS

Invitation to participants in the workshop

Dear Bro. [name]

I am writing to invite you to attend a workshop intended for all members of Lodges who wish to use the Members' Pathway. It is especially relevant to Lodge Mentors, Lodge Membership Officers (LMOs), Secretaries and other key stakeholders.

The purpose of the training is to help Lodge members use Steps 7-11 of the Members' Pathway; specifically to help them mentor, support and retain new members.

This workshop covers Steps 7-11 of the Members' Pathway and is complemented by another workshop covering Steps 1-6. There may be some benefit in attending the first part before the second, although it is not essential.

The training will take place on: [date]
At: [registration time] to [depart time]

Other members of your Lodge and others in the Province will also be taking part.

To help you to prepare, and so that we can make best use of the time on the training session, please read and complete the following before you attend the workshop:

1. Read the Members' Pathway Steps and Step Guides (see b.UGLE.org.uk)
2. Read all support documents referenced in Steps 1-6, including the role profiles for Lodge Mentor and Lodge Membership Officer (LMO).

To access these documents you will need a password, which will be provided to you once you have confirmed your attendance. The password will be personal to your use; it must be held in confidence and not shared without prior authority and permission.

At the workshop we will assume that you are familiar with the content so that we need not spend much time recapping the material. There will not be time during the workshop to catch up if you have not completed this work.

Please confirm that you will be attending by email to [email address] by [date], two weeks in advance of the workshop. This early date is to enable you to have sufficient time to complete the pre-workshop activities listed above.

If you have any questions, please do not hesitate to ask me before the session by contacting me on [phone] or [email address].

I look forward to seeing you at the training session.

Yours sincerely and fraternally

APPENDIX C: CASE STUDIES

Case 1: Alan

Aged 40 years old.
A Pharmacist with his own High Street shop.
Well known and liked by many of the members.
Joined the Lodge two years ago after being invited to an Open Evening.
His proposer and seconder are also new members.
Asks lots of questions and enjoys discussing Freemasonry over a pint in the local pub.
Concerned about learning ritual and has declined invites to deliver any so far.
Currently a Steward but not certain if he wants to take a floor office.

Case 2: Brian

Aged 62 years old.
Recently retired Civil Servant.
Introduced by a friend in the Lodge but did not know any other members.
His father had been a Freemason and he considered asking to join years ago but was concerned about impact on his career.
Shy and rarely comes forward. Has to be drawn into conversations and invited to join other Members for drinks.
Has read all of his father's Masonic books and asked about others he can read.
Has already delivered the first degree working tools, which he did with a little prompting.
Slightly put off when he overheard a PM comment about his delivery, "It was alright but not great."
Has agreed to become Inner Guard next year but has asked for extra rehearsals to get it right.

Case 3: Chas

Aged 25 years old.
A self-employed IT contractor specialising in Gaming Applications.
Joined a Universities Scheme Lodge as an undergraduate and has recently relocated to the area.
Selected this Lodge to join after contacting the Province. Did not know any members.
The Lodge Mentor is acting as Chas's personal mentor.
Recently married and bought his first house.
Very keen on Freemasonry but feels he has stepped backwards since moving Lodge.
Active on masonic social media and offered to set up a Lodge website and social media accounts.
Has demonstrated is competent at ritual and already delivered a flawless rendition of the long version of the second degree working tools.
Is currently a Stewards and keen to take a floor office.
Has asked about joining another Order and asked for advice as to which one.

Case 4: Derek

Aged 52 years old.

Manager in a local manufacturing business.

Has been a member for six years and is currently Junior Warden.

Attends all meetings of the Lodge, except on the rare occasions when his business activities take him out of the area.

His family supports the Lodge social events.

Works hard at learning and delivering ritual but struggles with some parts and is becoming concerned whether he can do a good job as Master.

Has already joined the Royal Arch but has said he doesn't understand it and attends less often due to work commitments.

Doesn't see much of his personal mentor who has had some business difficulties.

Case 5: Eddie

Aged 44 years old.

A long distance lorry driver.

Normally attends around half the meetings each year as his work takes him away a lot.

A member for 12 years, introduced into the Lodge by his father who passed away three years ago.

In the last year his attendance has trailed off.

Progressed as far as Senior Deacon but came off the ladder a few years back. No one can remember quite why.

Has not taken an office or particular role since.

No one has been assigned as his personal mentor because his father always wanted to look after him.