

# The Pathway (Steps 1 to 11)

## 1. Lodge Planning

*For a man known to existing members*

## 2. Identifying prospective candidates

## 3. Approaching prospective candidates

*For a man not known by existing members (e.g. via the internet)*

## 4. Responding to enquiries from potential candidates

*For all prospective and potential candidates*

## 5. Preparing the prospective candidate for interview

## 6. Interviewing the applicant

Lodge Membership Officer

## 7. Preparing the candidate for Initiation

## 8. Supporting the new Freemason

## 9. Introducing the Royal Arch

## 10. Retaining our members

Lodge Mentor

## 11. Retrieving members

Province

# Step 1: Lodge Planning

1

2

3

4

5

6

7

8

9

10

11

- Convene a meeting or series of meetings to discuss the future of your lodge
  - Include all members in this meeting or meetings, and not just the Past Masters or Lodge committee
  - A suitably skilled, respected and experienced member of the Lodge should chair these meetings
  - Involve the relevant leaders from your Province.
- Create a Lodge profile
  - A Lodge Profile describes the Lodge's key features and especially its characteristics, circumstances, expectations and values
  - Lodge profiles help members to identify prospective candidates who are a good match to the Lodge
  - Lodge profiles help members identify issues in the Lodge that need addressing
  - If a common feature emerges (such as a sporting interest, hobby, old school), develop a prospective member's 'profile'
- The Lodge in its community
  - UGLE is encouraging Lodges to become visible, recognised and respected within their communities
  - Lodge profiles can be developed into promotional or informational literature for the Lodge
  - The Lodge can engage in local community events
  - It can also organise its own private and public events and activities open to friends, family and other non-Masons
  - The Province should be consulted before any Lodge becomes involved in public events.
- During the planning meetings, identify:
  - An enthusiastic member (not necessarily a Past Master) for the role of Lodge Membership Officer(LMO)
  - At least one more knowledgeable member to assist the LMO when screening enquiries from potential candidates ([see Step 4](#))
  - A skilled interviewer to be Chairman of the Interview Panel
  - Two other knowledgeable members (at least one who is not a PM, at least one who is a PM) to be members of the Interview Panel.
- Make decisions, record them, set deadlines, assign responsibilities for action and review at intervals.

# Step 2: Identifying Prospective Candidates

1

2

3

4

5

6

7

8

9

10

11

- Set aside a separate meeting for this issue
- In advance ask all members to compile a long list of men who they know and bring it to the meeting
- Include family members, work colleagues, social club members, friends, fellow worshippers
- If any person on the list does not believe in the Supreme Being his name can be removed
- Apply each name on the long list to the items on the Lodge's profile and consider whether or not he would be compatible with Freemasonry and your Lodge in particular
- Bear in mind that diversity in membership is important in any successful group, especially in respect of having people with a range of different personalities, skills and qualities
- Avoid making any assumptions about any person's level of interest in Freemasonry, or their availability
- Group the names into categories as:
  - *Suitable to be approached for this Lodge*
  - *Suitable for Freemasonry but may be better suited to another Lodge*
  - *Don't know enough to decide*
  - *Not suitable to be approached.*
- The men in the second and third categories may still be approached but with a view to determining their interest in Freemasonry in general rather than your specific Lodge
- **Data Protection Act: To comply with privacy and data protection requirements, all records of those who will not be approached – both physical and electronic – should now be destroyed.**

# Step 3: Approaching Prospective Candidates

1

2

3

4

5

6

7

8

9

10

11

- What can a Freemason say to someone who is not a Mason?
  - The Board of General Purposes has stated that a Freemason is “free to reveal his own Masonic membership, except when it might appear that business, professional or personal advantage is thereby being sought for himself or another”.
  - A Freemason is free to discuss any aspect of Freemasonry providing he does not:
    - breach his obligation to keep the traditional modes of recognition private
    - describe the detail of our ceremonies.
- What should you say?
  - Create a succinct personal statement ready for a suitable occasion:
    - Describe your experience of Freemasonry and what you personally enjoy most
    - Look through the UGLE web site, *Freemasonry Today* and your own Province’s web site. You will see ideas from the Rulers and your Province’s leadership team
    - When delivering your pitch do more listening than talking – that way you can follow up topics that interest him
    - Above all be honest.
- What next?
  - If the person you are talking to remains open to the idea, invite him and his partner to a Lodge social or white table evening
  - Try and finish the conversation by giving him something physical such as your Province's website address and, if your Lodge has one, a Lodge Information sheet (based upon the Lodge profile created in [Step 1](#))
- When to stop?
  - Do not ‘flog a dead horse’ – you will lose friends and gain nothing for Freemasonry
  - If he does not mention the subject of Freemasonry again for some time, it is acceptable to raise it on one more occasion.

# Step 4: Responding to Enquiries from Potential Candidates

1

2

3

4

5

6

7

8

9

10

11

- This process should be managed by the Lodge Membership Officer, who liaises with the Lodge Secretary and others as need be.
  - Respond quickly to all enquiries (24 – 48 hours maximum) and maintain accurate records.
  - If the potential candidate ‘goes silent’, one reminder is permitted but no more.
- Be prepared to reject unsuitable people at this stage.
  - If the approach has come via UGLE or the Province, the Provincial Membership Officer (PMO) will be involved.
  - He will have selected your lodge as one into which the potential candidate may fit.
  - He will not be as familiar as you are with your Lodge and your preferred profile (if any) for candidates.
- Meet the potential candidate at a neutral venue, with one or two other Lodge members present but no more.
  - Create a warm and informal atmosphere.
  - If both parties wish to pursue the potential candidate’s possible membership, arrange a second meeting on Masonic premises.
- Follow up by inviting him to meet for a drink after a rehearsal so that he can meet other Lodge members and they can get to know him. Then invite him to Lodge social events so that his wife or partner can also attend and get to know others.
- If you judge the person unsuitable for your Lodge:
  - Explain that yours may not be the best Lodge for him.
  - Refer him to the Provincial Membership Officer as he may be suitable for another lodge.
  - Always be polite – he should be left with a good impression and memory of Freemasonry.

# Step 5: Preparing the Prospective Candidate for Interview

1

2

3

4

5

6

7

8

9

10

11

- This Step is completed by the two people who expect to be the prospective candidate's Proposer and Seconder (the sponsors).
- Where a potential candidate was not previously known to any members, we recommend the LMO should be one of sponsors.
- The sponsors and the prospective candidate are each asked to satisfy themselves, through informal meetings and discussions, that Freemasonry and the particular Lodge are right for the candidate and that he is right for it. This process is called screening.
- The sponsors can use a number of techniques to seek the information required for screening.
- Be open, honest, clear and direct about the commitment involved in becoming a Freemason.
- Anything that happens outside of Lodge meetings can be described. Avoid describing the ceremonies, including Masonic Fire, and their meaning in detail, so as not to diminish the impact of Initiation.
- Meet informally with the prospective candidate on as many occasions as necessary to explain and discuss:
  - The nature of Freemasonry, what it is and what it is not.
  - The expectations and duties of membership, including the commitment in time and money.
  - The normal journey of a Freemason, including eventual Exaltation into the Royal Arch.
  - The specific features of your Lodge, using your Lodge profile as a resource.
- If invited by the prospective candidate, discussion may take place at his home and in the presence of his spouse or partner.
- If all parties wish to proceed, ask the prospective candidate to complete the UGLE Member Application Form and, after both sponsors have also signed it, submit it to the Lodge Secretary on his behalf. He is now an applicant.
- If any party has reservations about the prospective candidate, the LMO should discuss the matter with the Lodge committee.
- Tell the applicant what will happen at the interview and that you will attend with him.
- If the screening process has gone well, you will have covered informally, and without leading, the information and issues that the interview panel will want to discuss and you can be confident that the applicant is likely to give satisfactory answers.

# Step 6: Interviewing the Applicant 1 of 2

1

2

3

4

5

6

7

8

9

10

11

- We recommend that the Interview Panel should be more or less permanent and that:
  - It comprises no more than three members of the Lodge, all of whom are experienced interviewers.
  - There should be at least one Master Mason and one Past Master.
  - There is no reason why the Lodge Membership Officer cannot be a member.
  - The panel's permanent chair should be a skilled interviewer who is an approachable senior member of the Lodge.
  - The membership of the Interview Panel should be agreed during [Step 1](#), Lodge Planning.
- The Panel conducts applicant interviews on behalf of the Lodge and reports to the Lodge Committee:
  - The Master does not have to be a member.
  - The applicant's sponsors attend to support him.
  - The sponsors are not involved in conducting the interview.
- The Interview Panel should conduct itself with a degree of formality, including the use of written invitations and decisions, which may for convenience be sent by email.
- Plan the interview and prepare open questions to obtain the information sought from the applicant.
- Use the example questions with skill and discretion, adjusting questions based upon the applicants previous answers.
- Conduct interviews in a proper manner, using recognised techniques for interviewing candidates.
- Meet after the applicant has departed to decide and communicate the outcome.
- Your Provincial Membership Officer will be able to offer further guidance and assistance if required.

# Step 6: Interviewing the Applicant 2 of 2



Information sought	Reason why it is sought
<b>Whether he believes in a Supreme Being.</b>	A core requirement of membership is to believe in a Supreme Being. If there is any doubt on the definition of Supreme Being, sponsors should seek formal guidance via their Lodge Secretary.
<b>Overview of self and lifestyle (family, hobbies, work, charitable interests, other organisations).</b>	To set a context for the rest of the interview and to provide information that can be explored further.
<b>Suitability for this specific Lodge.</b>	To explore and expand on the applicant's suitability for this specific Lodge and its characteristics.
<b>Personal characteristics, qualities and values.</b>	To get the applicant to talk about his values without first telling him about ours.
<b>Alignment with Masonic values / principles.</b>	To check that his values / principles are compatible with ours.
<b>Reason for interest in Freemasonry and motives for joining.</b>	To identify the applicant's motives and to ensure they are compatible with the Craft's values and expectations.
<b>Existing links with Freemasons.</b>	To identify any background in or experience of Freemasonry.
<b>Hopes and expectations on becoming a Freemason.</b>	To check that the applicant's expectations are compatible and can be met by the Craft and by the Lodge.
<b>Likely contribution he could make as a member.</b>	To identify the strengths the applicant will bring to the Lodge and any likely future contribution.
<b>Family and their opinions or support for membership.</b>	To ensure the applicant's family is supportive and will not hinder the applicant's development if he joins.
<b>Support for the Lodge's charitable activities.</b>	To prepare the applicant for future charitable contributions.
<b>Ability to meet time and cost commitments.</b>	To ensure that the applicant is able and willing to meet the commitments expected, in time and money.
<b>Awareness of the normal progression.</b>	To check he knows of the normal progression through the three Craft degrees, taking office and Exaltation into the Royal Arch.
<b>Any other information.</b>	"Catch all" final questions.



# Step 7: Preparing the Candidate for Initiation 1 of 2



*Taking the candidate from the successful conclusion of his interview through to his initiation. It represents the beginning of the mentoring process. Co-ordination of the Pathway passes from the Lodge Membership Officer to the Lodge Mentor.*

## **GUIDANCE FOR ALL LODGE MEMBERS**

- The Candidate / Initiate will form lasting impressions of Freemasonry based on his early experiences.
- Lodge members should understand and manage his expectations, deliver what has been promised and avoid creating unpleasant surprises.
- If the preparation for Initiation is rushed or progresses at a pace that is uncomfortable for the Candidate the consequence may be his early resignation.
- Plan the date of Initiation by balancing the Lodge's programme of work with the needs, circumstances and interests of the Candidate. Consider the suitability of multiple ceremonies.
- Where possible, ensure sufficient time before the planned date of Initiation for the Proposal, Ballot and Initiation to take place at different - preferably successive - meetings.
- When briefing the Candidate for his Initiation before the ceremony, strike a balance between telling him too much and not telling him enough.
- Too much prior information may damage the experience. Too little may leave the Candidate with unnecessary or uncomfortable apprehensions.

# Step 7: Preparing the Candidate for Initiation 2 of 2



## AT THE INITIATION MEETING

- Arrange to collect the Candidate, take him to the meeting and return him home afterwards.
- Introduce him to the Master and Junior Deacon before placing him in the care of the Tyler.
- Arrange for him to be sat next to his Personal Mentor or a sponsor at the end of the ceremony, and next to or as near to as practicable one or both of them at the festive board.
- Have some cash for him so that he can contribute to the charity collection and a copy of the closing ode.
- Introduce him to other members of the Lodge after the ceremony.
- Explain the toasts and practices followed at the festive board.
- Discuss with him his initial reaction to the ceremony and respond to his questions.
- Provide him with copies of any local introductory booklet, such as the *“Initiate’s Guide”*, as well as a simple explanation of the Initiation ceremony. Explain that he can share these with his spouse or partner.
- Arrange to meet with him within two weeks of his Initiation, to answer additional questions and provide further explanation.

# Step 8: Supporting the New Freemason 1 of 2



*This Step starts immediately after Initiation and follows the new Freemason as he goes through the degree ceremonies and experiences elements of Freemasonry for the first time.*

## **WHY IS EARLY SUPPORT SO IMPORTANT?**

- At this point the new Freemason is at his most vulnerable; a significant proportion of new members leave the Craft within two years of Initiation, often before becoming Master Masons.
- The Personal Mentor and sponsors have a small window of opportunity to respond to all early reactions, to address any questions or concerns and to provide the support that the new Freemason needs.
- If the new Freemason perceives either the ceremony or the actions of Lodge members to be anything other than positive, or if his expectations are not met, he may consider terminating his membership.

# Step 8: Supporting the New Freemason 2 of 2

1

2

3

4

5

6

7

8

9

10

11

## **GUIDANCE FOR PERSONAL MENTORS**

- Arrange to meet with the new member soon after each ceremony, to help him reflect, practice signs, address questions and relate the latest ceremony with the previous ones.
- Draw on topics for discussion with a new Freemasons but proceed at his pace. Avoid “force feeding” him with what you think he should know and understand.
- Gauge the new member’s level of interest and enthusiasm and respond at that level.
- Pass on any communications or resources provided by the Lodge and the Province. Help him to find the information that he wants from the various materials he will have been given.
- Sit with the new Freemason in the Lodge and on any visits. Explain what is happening and always demonstrate correct behaviours, such as obeying the gavel.
- Prepare him for the ceremonies of Passing and Raising by helping him to learn the questions leading to the degree and the answers to give in open Lodge.
- Represent his needs and interests within the Lodge.
- Be the first source of advice and guidance on Masonic matters.
- Look out for any discomfort or drops in interest, attendance or commitment and respond early.

# Step 9: Introducing the Royal Arch

1

2

3

4

5

6

7

8

9

10

11

*This Step follows the new Freemason's completion of the three degrees of Craft Freemasonry and looks at the Lodge's role in introducing him to the Royal Arch.*

- The Royal Arch is the completion of the journey in pure Ancient Freemasonry and all reference to it being the completion or an extension of the Third Degree has been removed from the ritual and other documents.
- The Royal Arch should have been mentioned in the discussions during [Steps 5](#) and [6](#).
- An ideal point to mention it again is when a Master Mason is presented with his Grand Lodge Certificate.
- There are four reasons to become a Royal Arch Mason:
  - First, because of the indissoluble link between the Craft and Royal Arch as the two component parts of pure Ancient Freemasonry, exemplified by the fact that the Grand Master and Pro Grand Master automatically head both orders.
  - Secondly, to complete the journey of a man from the practical principles taught in the Craft to the spiritual aspect of our nature, as explored in the Royal Arch.
  - The third reason is the ceremony of Exaltation itself, which is one of the most beautiful, colourful and thought provoking in Freemasonry and in which the genuine secrets, that were lost and substituted during the Master Masons' degree, are revealed.
  - Fourthly, for the companionship and enjoyment that comes from meeting a wider circle and from the increase in Masonic experience and knowledge. Joining the Royal Arch should increase one's enjoyment of Freemasonry.
- No pressure should be applied to coerce a Master Mason to join the Royal Arch or any other Order.
- The decision and timing must be his and he should not feel that he is a second class Freemason if he chooses to delay joining or not to join at all.
- The Royal Arch may enhance his membership and enjoyment of the Craft but it is not essential to it.
- The Royal Arch Representative acts as the link between the Royal Arch and the Lodge. His role is to raise the profile of the Royal Arch, to act as a source of information about the Royal Arch and to foster relations with Royal Arch Chapters.

# Step 10: Retaining our Members 1 of 2



## GUIDANCE FOR LODGES

- Build a Lodge culture with a nurturing approach, or continued mentoring, that considers the needs of all members and treats all members as they would wish to be treated themselves.
- Find ways to involve every member in the life of the Lodge, through formal or informal roles and contributions suited to them, to increase their sense of belonging, interest and commitment.
- Plan the succession of continuing offices in the Lodge, such as Treasurer, Secretary, Director of Ceremonies, Lodge Mentor etc. so that recent Past Masters can take office, develop as Masons and continue to contribute to the Lodge.
- Seniority brings with it a responsibility to lead by example, to set high standards of behaviour and to demonstrate the essential characteristics of a Freemason; kindness, tolerance and courtesy.
- Be alert to un-Masonic conduct, inappropriate behaviour and discouraging or negative exchanges, all of which undermine the interest and confidence of members and the harmony and health of the Lodge.

# Step 10: Retaining our Members 2 of 2

1

2

3

4

5

6

7

8

9

10

11

## GUIDANCE FOR LODGES

- Plan meetings to be enjoyable, interesting and informative, with a good atmosphere and good ritual, to meet the expectations of members and to assist their self-improvement.
- Consider new approaches to enhance Lodge meetings.
- Ensure meetings are well prepared and conducted efficiently. Working members are accustomed to business meetings occupying the minimum time necessary. They expect the same of a Lodge, with time devoted to ceremonial or education rather than administration .
- Review Lodge traditions to confirm whether they are still relevant and serve the Lodge well. Be willing to change or evolve any traditions that are counterproductive to the future of the Lodge.
- Monitor attendance at Lodge meetings and maintain contact with those members who are not able to attend as often as they would like, to retain their interest, support and – ultimately – their membership.
- Look out for any discomfort or drops in interest, attendance or commitment and respond early.
- If a brother is moving out of the area and regular attendance at the lodge becomes difficult, assist him to find a Lodge in his new location, perhaps with help from the Province.

# Step 11: Retrieving Members

1

2

3

4

5

6

7

8

9

10

11

*This Step describes the early warning signs of a potential resignation and ways to respond to retain or retrieve the member as a happy, valued and participating member of the Craft.*

- Some members will decide that Freemasonry is not for them and will resign at an early point. With proper screening, an understanding of expectations and successful mentoring these should be the minority.
- Warning signs include absences from meetings, last minute apologies, late payment of dues and low levels of engagement in general.
- Lodges that recognise the warning signs and respond early can often avert resignations before they happen.
- If a resignation is due to a decline in circumstances (such as finances or health), arrange for the Lodge Almoner to offer support to the member.
- Consider asking a member to reconsider reporting a resignation to the Lodge and the Lodge accepting it before accepting his resignation.
- Accept that if the Lodge cannot retain a member it may still be possible for the Province to retrieve him if he moves to another Lodge.