



The True
MASONIC CHART
or
Hieroglyphic Monitor
Containing
ALL THE EMBLEMS EXPLAINED
in the Degrees
Entered Apprentice, Fellow Craft, Master Mason, Past Master, Most Excellent Grand Master, Arch Royal Master, and Supreme Council.
Designed and duly
approved by the
R. W. J. P. M.

Grand Lodge of Massachusetts

Membership Retention

Manual



THE MOST WORSHIPFUL GRAND
LODGE
OF ANCIENT FREE AND ACCEPTED MASONS
OF THE
COMMONWEALTH OF MASSACHUSETTS

Lodge Retention Program

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Introduction

The purpose of this document is to summarize methods and activities from active and successful Lodges that have a strong membership and lasting vitality. It is not meant to be a solution to a Lodge that is having member retention problems. Rather, it is a place to turn for guidance in finding ideas and methods to uncover root causes of the problems and develop a process to address them.

There is no "magic pill" that will solve a Lodge's membership retention problems. Active and successful Lodges have demonstrated certain characteristics that keep their members coming to meetings and participating with the Lodge. There is an old adage that says, "If you always do what you've always done, you'll always get what you've always gotten." So you have to find new and different ways to address problems. If a Past Master says, "We have never done it that way," then, perhaps, it might be just the solution you need.

THE MATERIALS DISCUSSED HEREIN ARE INTENDED FOR THE BENEFIT OF MASSACHUSETTS LODGES AND THEIR MEMBERS, AND TO SUPPORT AND PROMOTE THE MASONIC TENETS OF BROTHERLY LOVE, RELIEF, AND TRUTH.

What is Retention?

Retention is all about engaging your members, not as dues-paying no-shows, but as active and interested brothers who attend meetings and gladly and enthusiastically participate (get in line as an Officer, work on committees, run programs, cook the dinner, etc.)

Retention is just one part of the broader issue of Membership, so Retention does not encompass the process of bringing in new members; it is involved with engaging the hearts and minds of those who have signed the bylaws. The burning issue that needs to be addressed in Retention is, "Brothers Jim Smith and John Jones are no longer attending meetings or participating. How can we recapture their interest?"

Following are some of the steps taken by successful Lodges to ensure an active, vibrant Lodge community. These ideas are presented as ten "commandments" for ensuring an active Lodge. If your Lodge is having difficulty retaining members, maintaining good attendance, or keeping new members active, consider how the programs and activities embodied in these "Ten Commandments" might help you change direction.

Ten Commandments for Ensuring an Active Lodge

1. ***Communicate with every member of the Lodge***
 - Call in-state and out-of-state members regularly
 - Send birthday and holiday cards
 - Service Officer should be aware of sickness or distress
 - Know who is not doing well and needs help
 - Send flowers and cards for funerals
2. ***Have an active Masonic widows program***
 - Visit Masonic widows regularly
 - Send holiday cards and/or flowers
 - Invite them to a special ladies night as guests of the lodge
 - Provide assistance as needed
3. ***Greet every member at every meeting***
 - Have candidates serve as greeters at the Lodge door
 - Shake every member's hand at every meeting
 - Introduce Masonic visitors and those helping with the meeting
 - Thank the officers and Past Masters for their help and support
4. ***Understand the needs of your members***
 - Ask what programs the members want
 - Survey the members and respond to their feedback
 - Adjust your plans according to your member's desires
5. ***Get to know your member's families***
 - Have family activities that bring families to lodge
 - Be involved in community activities that include family members
 - Know when special events are happening in a member's family
 - Spouse and children's birthdays, graduations, awards and prizes
6. ***Ask your members to take an active role in the Lodge***
 - Create jobs to enroll as many members as possible
 - Keep them active and involved
 - Don't create "busy work," make it real.
 - Make everyone feel needed and appreciated
7. ***Plan your work – Work your Plan***
 - Make the Grand Master's Award a goal
 - A Five-Year Lodge Plan is best
 - Involve all officers in planning process
 - Each officer has a part to play in the Five-Year Plan
8. ***Show your appreciation to your officers and members***
 - Certificates of Appreciation
 - Recognition dinners
 - Honored guest at Table Lodges
9. ***Be proud of your Lodge***
 - Take an active role
 - Don't get discouraged when things don't change quickly
 - Be an innovator and driver
10. ***Be the catalyst for your Lodge***
 - Be enthusiastic, energetic and committed
 - Be a creative leader that brings excitement to your lodge

The Lodge Retention Program

This Lodge Retention Program outlines a five-step program to address issues related to membership retention in your Lodge. If your lodge doesn't have an issue or problem with membership retention, congratulations! This program still may help keep your lodge active and vital. However, if you think your Lodge has sparse sidelines or you are having problems filling the officer line, you could probably benefit from using at least some of the processes and ideas contained in this plan.

The five steps are:

1. **Understand the Scope of the Problem**
2. **Know the Strengths and Weaknesses of Your Lodge**
3. **Develop a Five-Year Plan for Your Lodge**
4. **Work The Plan**
5. **Measure Success**

A key concept in this plan is to know what your membership wants in their Lodge and then give it to them. There is a well-known line spoken in the movie "Field of Dreams" -- "If you build it, they will come." So, if you build a strong and active Lodge membership, sparse sidelines should cease to be a problem.

Step 1: Understand the Scope of the Problem

Methods to Assess the Condition of Your Lodge

Brainstorm with the Brethren. Include everyone who is willing to offer opinions. Every Brother needs to feel wanted and a necessary part of the solution. Encourage Brothers to buy into the concept of improving the Lodge. Be sure to include the points of view and ideas of all. Complete discussions and meetings with different segments of the Lodge membership. Then compare and combine ideas.

Consult your Lodge officers. Lodge Officers offer a perspective of those who run the Lodge. Encourage thinking in new directions.

Consult your Past Masters. Past Masters offer experience and leadership. Avoid derailing ideas via the "we never did it this way before" model. Encourage thinking in new directions.

Conduct telephone interviews. Form a committee of Officers, Past Masters and volunteers to telephone the Brethren and ask preset questions to obtain the information that you require. Decide what demographic of your membership you wish to survey (e.g., inactive Brothers who have not been to Lodge in a specified amount of time, or newly raised Brothers who have stopped attending Lodge).

Surveys

There are many types of surveys available to fit your needs. Decide what you want to ask and choose your questions accordingly. The survey should not be too long or tedious. Do not allow the respondent to lose interest in the task at hand.

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Survey Contact Methods

Face-to-face interviews. Personal contact is the most appreciated and open means of communication. Body language can answer many questions. You may find that those Brethren who have been away for a while may want to talk and you may have difficulty keeping the conversation on track. Keep to the points at hand without seeming disinterested in what your Brother has to say. You need a group of questioners to interview the respondents, because the process is very time-consuming.

Phone. Telephone your demographic to present the survey and obtain instantaneous responses. Be aware that the responses may not be as open as those in writing might be. You may find that those Brethren who have been away for a while may want to talk and you may have difficulty staying on topic. As above, keep to the points at hand without seeming disinterested in what your Brother has to say. You need a group of questioners to make these calls because this process can be time-consuming.

Mail. Mail the surveys to the chosen demographic with instructions to mail the responses back. Set a deadline for the responses and stand firm by the deadline. Telephone follow-up is necessary with a mailed survey.

E-mail. Similar to a mail survey, but limited to those with e-mail access. Telephone follow-up should be a standard process.

Evaluating the Results of Your Survey

Evaluation forms allow you to categorize and analyze all the data collected in an easy-to-understand format. This can be done in a number of different ways:

- Pie charts
- Percentages
- Sum of certain responses

Of course, some written data you may want to consider in full, such as comments made by Brethren regarding specific issues, so you may want to have a separate sheet to be able to categorize them properly, such as:

- *Severity of complaint* -- is it important or frivolous?
- *Commonness of problem* -- how many Brethren feel the same way?
- *Difficulty of solution* -- can it be fixed and how hard would it be to fix?

In situations where names are needed (e.g., to arrange transportation, or to send birthday cards in a given month), simply make a list of the pertinent information and leave enough space to assign another Brother the task. This ensures both responsibility and accountability on both sides.

Step 2: Know the Strengths and Weaknesses of Your Lodge

Analysis Tools

The simplest way to go about understanding your Lodge and its capabilities is to analyze its strengths, weaknesses, and available resources. The resources available to your lodge may be physical (e.g., the Lodge building), financial, or human (i.e., the members) in nature.

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SWOT Analysis

One of the most popular ways in which businesses assess their current status as well as the opportunities or obstacles which lie ahead is by identifying **Strengths**, **Weakness**, **Opportunities** and **Threats**, or **SWOT** for short. This business tool can be applied to many situations, including the status of your lodge. There are many books available on the subject should you or your lodge brethren wish to learn more.

Creating a SWOT might seem simple, but it can get complicated, because a SWOT can be as broad or as narrow as you need it to be for a given situation. For example, you could do a SWOT based on the overall state of the Lodge facilities, or you could narrow it down to look at how difficult trying to implement a single event would be.

When creating a SWOT, you need to consider many different areas. At the same time, it's important to keep each area organized. For example, if you are dealing with putting on a special fundraising dinner, the assessment may proceed along the following lines:

Objective: Conduct a Fundraising Dinner

Strengths:

We have Brethren who enjoy cooking.
Brethren who can help with catering.
A lot of Brethren came to these dinners when we had them before.

Weaknesses:

Budget - How many people can we feed for a reasonable price?
Physical space - How many people can we fit comfortably in the Lodge hall?

Opportunities:

Can we entice Brethren to return to Lodge with this dinner?
Can we give someone an opportunity to do something they have always wanted to do?

Threats:

What if the building is rented out?
Do we have the financial resources?
Do we have the manpower?

This is a small example, and it may seem that it is too simple. However, when you can itemize your details, you are far less likely to be surprised should a problem arise. You will have prepared for it in advance of making any commitments. To be fair, the SWOT is much more practical when done on a large scale, and especially in conjunction with a five-year plan.

Developing a Skills List

One of the best things you can do for your Lodge is to develop a skills list. You can start with the information you gather from the surveys, but you can also simply call or sit down with your Brethren and ask them! Also note that a skills list is not necessarily limited to someone's occupation – an engineer may like to cook, but no one has asked him to help with collation. By knowing what your Brethren can do, you can help them to get involved in the activities of your Lodge.

A skills list serves many purposes:

- You know what resources are available.
- You know who would be more willing to help with a particular event or idea
- You know what your Brethren do for work and their hobbies.
- You can share resources with other Lodges in your building or area who may not have that resource
- You can introduce Brethren to candidates with similar skills and interests.
- You can point a Brother toward another Brother who has a resource he needs.

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You can organize your skills list any way you want, but a few things are essential:

- Name
- Lodge (if the list is going to be used in a larger area than a single Lodge)
- Skill(s)
- Contact information
- Where the person is willing to work (i.e., distance from home or types of jobs, or only for their Lodge, or for particular Lodges)
- If a fee is required, and how much.

Note: With the last statement in mind, it is important neither to overuse nor under-appreciate those Brethren who have useful skills, or they will eventually stop helping. It is important also to get permission from the Brethren on your Skills List if you are planning to share the list among multiple Lodges. Also, in fairness, most Brethren who earn their living in a trade should be paid a fee if they are asked to do a long-term task, such as roofing, plumbing, or electrical work in the Lodge.

Step 3: Develop a Five-Year Plan for Your Lodge

The importance of planning for future success cannot be overestimated.

1. Create a Mission Statement

To ensure everyone in your lodge is operating on the same page, so to speak, it is essential to formulate a lodge mission statement. For example:

Symbolic Masonry is a fraternity of men with a mission to:

- Promote the tenets of Brotherly Love, Relief, and Truth.
- Improve the individual character, leadership, and spirit of our Brethren through relevant programs.
- Inspire men to support the principles of the organization.
- Promote family and community values.
- Strengthen and promote Symbolic Masonry and its worldwide brotherhood.
- Serve mankind through the impact of its extensive charitable outreach

What does *your* Lodge have as its mission?

2. Set Measurable and Meaningful Goals

A lodge may aspire to several goals. As you formulate your mission, start thinking about just what it is you and your fellow lodge members are trying to accomplish through the active duties of the lodge. Here are some examples:

- Understand the makeup of our Lodge and what the Brethren desire.
- Be attractive to Masonic Brethren.
- Build closer working relationships with Grand Lodges and other Masonic-based organizations.
- Be an organization that is managed effectively.
- Be led by men with effective leadership skills.
- Be recognized as a fraternal organization committed to philanthropy and community service.
- Be active in the community at large.

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- Be endorsed by the member's family.
- Develop and implement an aggressive retention program that reduces attrition, improves attendance and encourages Officers.
- Develop and conduct groups to assist Brethren in encouraging participation, involvement and retention.
- Conduct critical review of meetings and other Lodge functions.
- Determine a percentage retention figure and establish it as a goal to maintain.

3. Specify Your Objectives

A lodge may eventually have several specific objectives it wishes to accomplish, such as:

- Develop and implement a member improvement program.
- Provide ongoing and regular feedback to all our Brethren.
- Conduct "Focus" groups to assist our Brethren in achieving success and determining ways of increasing participation.
- Sponsor and coordinate programs of interest to our Brethren and their families.
- Understand the social and ethical needs of families in today's society and how this relates to and affects the individual Mason.
- Increase a long-term sense of commitment to the Fraternity.
- Establish widows and family life programs.
- Increase youth awareness and interest in the Fraternity through DeMolay, Rainbow, and similar activities.
- Develop a program for the orientation and education of candidates.
- Videos & DVDs.
- Special programs of interest.
- Assure timely implementation of retention initiatives.
- Explore areas of mutual interest with your Brethren.
- Build and strengthen partnerships with other Lodges for mutual program development and membership retention.
- Improve interactive communications within the Lodge.
- Expand the use of men with effective leadership skills, who can assume positions of responsibility within the Lodge.
- Identify and recruit support from leaders in the community.
- Increase the involvement of our Brethren in charitable programs.
- Establish criteria to be used in promoting membership benefit plans.
- Centralize Masonic training and other programs to be consistent across the state.
- Enhance and expand relationships with related Masonic bodies.

An integral part of developing your Five-Year Plan will be to identify the objectives your Lodge wishes to accomplish. That process will require active engagement with your members if it's to be successful. How should this be done? This is where effective Lodge management comes into play.

Effective Lodge Management: Consultation and Consensus-Building

"Brethren, such is the nature of our institution that, while some must of necessity rule and teach, so others must of course learn to submit and obey..." Masonry is a fraternal organization, which prides itself on the equality of its members. As noted in the preceding quotation from the "General Charge," certain members must take a leadership role for each individual Lodge to survive and flourish. How this Lodge management is conducted can have a profound effect on the success of the Lodge.

The purpose of this Section is to examine the various techniques of Lodge management that exist and to determine which approach to leadership is best suited to a modern day

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Craft Lodge. The goal is to determine how to best develop and implement a successful management scheme in the Lodge.

Management Styles

Lodge management can run the gamut from totally autocratic to fully democratic. The successful formula probably lies somewhere in between. Perhaps you will identify the style that is employed by Lodge. Maybe you will be pleased with what you find. You may identify problems with your Lodge's management style. If you do recognize problems, perhaps this Section will enable you to identify solutions to those problems.

Changes are occurring daily all around us. We cannot drag our feet in an attempt to stop the changes. We must adapt to those changes so that we will survive. Freemasonry, therefore, must also change to keep up with the evolution of society. In this manner, not only will Freemasonry survive in the new century, it will flourish. The key is to recognize that Freemasonry cannot stand still in this fast-paced world. It must be at the forefront of change, not in those areas which are inviolable, but in Lodge management.

Preparation

Preparation is essential for a successful meeting. A logical approach will enable you to achieve your objectives. The following items may be helpful in preparing and delivering an excellent meeting presentation:

- ✓ Be prepared before the meeting starts. Use a checklist.
- ✓ Set tables and chairs for maximum effect.
- ✓ Start and end on time.
- ✓ Ensure that all participants are introduced.
- ✓ Present the meeting objectives. Set the stage – who? What? Where? When? and why?
- ✓ Set the guidelines...what will you cover.
- ✓ Everyone is entitled to an opinion.
- ✓ Encourage participation. Controversy accepted, but it should be controlled and sincere
- ✓ Take regular breaks throughout your sessions. Never go past 45 minutes without a break or stretch.
- ✓ A change of pace can keep group interest high. Try breaking into groups.
- ✓ After a break, review quickly what you have just covered. Then outline what is to come.
- ✓ Encourage note taking for home review.
- ✓ Get people to believe in themselves.
- ✓ The better the planning, the better the meeting. What are the needs? What has to be accomplished? Answer those questions then set your goals.
- ✓ Write out your plan on paper so you can focus on the goal. This will also keep you on track.
- ✓ Build upon your successes. Once your plan is established it will be relatively easy to start future sessions from where you left off.
- ✓ Practice before you get in front of the group.
- ✓ Let the participants do the work of developing answers to the questions. They must, at the end of the day, take ownership.
- ✓ Always follow-up, give feedback and instill confidence.

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Asking Questions

The technique of asking questions is an art that everyone should master. You should ask questions to open a discussion, keep interest alive, get participants involved, advance the discussion, develop the topic, gain acceptance, or to get action.

- Allow people to talk and develop answers.
- Do not restrict yes or no responses.
- Allow expression of opinions, thoughts and ideas.
- Probe for more information.
- Qualify a person's thinking.
- Open questions usually begin with Who? What? Where? When? Why? and How?

Starting the Lodge Retention Program

- Meet with the Master and Wardens (if you aren't one already) and provide them an overview of the Lodge Retention Program
- Form a small committee of two or three Brethren with whom you can easily work.
- Meet with your new committee and review the Retention Program with them. Do some brainstorming and give some thought to the condition of your Lodge. How has attendance been? What are your observations? You may want to include your Master in this meeting as well (assuming you aren't the Master already).
- At the earliest opportunity, speak to the Lodge and give an overview of the Retention Program to the Brethren. If time permits, put some questions to the floor, ask the Brethren what they like or dislike about their Lodge. If you are thinking of doing a survey, tell them. Ask for their suggestions and their feedback.
- Surveys - many Lodges have tried them with varying results. Only a small percentage of the surveys are returned. Give plenty of thought to what you hope to achieve and how you will get your Brethren to complete and return this survey. You may get some ideas or an explanation from some of the Brethren as to why they don't attend.
- Document your plan in writing
- Try to think of ONE thing you could do right away that might inspire someone to come back to Lodge ... then focus on that one idea. Don't start a lot of different projects at once.
- If possible, avoid being placed on other committees.
- Don't postpone the start-up of this important program. Like the Nike commercial says, "JUST DO IT!"

Separate the PEOPLE from the PROBLEM

Deal with the facts only. It is difficult to deal with a problem with people misunderstanding each other, getting angry or upset, and taking things personally. People tend to see what they want to see. Out of a mass of detailed information, they tend to pick out and focus on those facts that confirm their perceptions and to disregard or misrepresent those that call their perceptions into question. Give each side a stake in the outcome by ensuring that they participate in the process. If they are not involved, they are hardly likely to approve of the solution. Often, people will continue to hold out, not because the proposal is unacceptable, but simply because they want to avoid the feeling or appearance of backing down to the other side.

Proposals should be made that are consistent with their values. Reconciling an agreement with principle and should maintain the self-image of both parties. If the parties view themselves as adversaries in a personal confrontation, it is difficult to separate their relationship from the problem. A more effective way is for the parties to think of themselves

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is as partners in a side-by-side search for a fair agreement advantageous to each and beneficial to the Lodge.

Focus on INTERESTS, not Positions

List the facts. Since the parties' problem appears to be a conflict of positions, and since the goal is to achieve agreement on a position, they naturally tend to think and talk about positions -and in the process, often reach an impasse. The basic problem lies not in conflicting positions, but in the conflict between each side's needs, concerns and fears, that is, their interests. Interests motivate people. Their position is what they have decided upon, but their interests are what caused them to decide. Looking to their interests instead of their positions makes it possible to develop a solution. Behind opposed positions lie shared and compatible interests, as well as conflicting ones. Agreement is often possible precisely because interests differ. Shared interests and differing, but complementary interests, can both serve as the building blocks for a wise agreement. A position is likely to be concrete and clear, unfortunately the interests underlying it may well be unexpressed, intangible and perhaps inconsistent.

The problem, then, is to identify those interests. One basic technique is for the mediator to put himself "in the shoes" of each party. Examine each position they take, and ask himself "Why?" One useful way to uncover interests is first to identify the basic decision each party seeks, and then to determine why the other party has not made that decision.

What interests of theirs stand in the way? The purpose of mediating is to serve the best interests of the Lodge. The chance of that happening increases when there is communication between the parties. Each side may not know the other's interests. If each side is to take the other party's interest into account, the mediator has to explain to them what those interests are. He must be specific. Concrete details not only make the description credible, they add impact. People tend to listen better if they feel that they have been understood. It also helps to acknowledge that their interests are part of the overall solution being sought.

Invent Options for Mutual Gain

It may seem that there is no way to "split the pie" that leaves both parties satisfied. Often the solution appears to be an either/or choice that is either markedly favorable to one side or the other. As valuable as it is to have options, people involved in negotiation rarely sense the need for them.

There are four major obstacles that inhibit the inventing of an abundance of options:

1. Premature judgment - inventing options does not come naturally.
2. Searching for the single answer -in most people's minds, inventing alternatives simply is not part of the negotiating process.
3. The assumption of a fixed "pie" - each side sees the situation as essentially "either/or", either I get what is in dispute, or the other party does.
4. Thinking that "solving their problem is their problem" - each side is concerned with only its own immediate interests.

To invent creative options that deal with the facts, then it is necessary to:

- Separate the act of inventing the options from the act of judging them, since judgment hinders imagination.
- Broaden the options on the table, rather than look for a single answer.
- Search for mutual gains - shared interests help to produce agreement.

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- Invent ways to make the decisions of each party easy -confront each side with a choice that is as painless as possible.

Insist on Using Objective Criteria

The more often standards of fairness, efficiency or merit are brought to bear on the problem, the more likely that a final course of action will be produced that is wise and fair. Approaching agreement through discussion of objective criteria also reduces the number of commitments that each side must make and then break as they move toward agreement. In positional bargaining, each party spends much of the time defending its position and attacking the other side's position. The use of objective criteria tends to employ time more effectively talking about possible solutions. Objective criteria need to be independent of each side's will and, to assure a mutually beneficial agreement, should also be logical and practical. When change appears necessary and differences in how to address the issue exist, the preceding methodology should be employed. To assist in reaching the proper conclusions, the following process should be considered:

Assemble the pertinent information from available sources, such as the Constitutions of the Grand Lodge and Lodge By-Laws, experience and expert knowledge of Brethren, tradition and history to form a basis from which to begin, review of past records, consult with other Lodges and data sources within the Craft.

- Review the assembled facts with representatives of the Lodge.
- Establish a committee to devise a plan to bring about the appropriate change, chaired by a Brother possessing mediation skills. Committee members should be selected for their abilities in relation to the issue, and to represent the interests of the membership.
- Committee proposals and recommended action shall be reviewed by representatives of the membership prior to submission to the Lodge for discussion, modification and approval or rejection.
- Implement the agreed change, and review progress and results with the membership on a regular basis.

A good plan for each meeting should include the following elements:

- Establish your objective. It may simply be to have a successful meeting.
- Set the goals necessary to achieve that objective.
- Perform the work of the evening with dignity and decorum to ensure a smooth-flowing meeting and to end at a reasonable hour.
- Define specific tasks.
- Organize the business portion so that it is accomplished efficiently.
- Ensure that all participants in the work of the evening are well-versed in their parts and know when to act.
- Try to foresee anything that could arise during the meeting.
- Time all segments and ensure that they are appropriate for discussion.

Assign responsibilities. You are the leader, set the strategy. Assign tasks to the Secretary, Wardens, other Officers and certain Brethren. Let each one know what is specifically expected of him and establish controls to evaluate performance. Your map is only of value if you check it from time to time to ensure that you are still on course.

The order of business at a Lodge meeting is often specified in the Lodge By-Laws; however, it can be revised at the discretion of the Master. Your plan for the evening should be developed on that sequence.

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Roles and Responsibilities in the Lodge

Lodge management in the 21st Century requires widespread participation by the Brothers, under the strong direction of the Master. In this environment, each Brother is afforded the opportunity of participating in the active duties of the Lodge, and thus is likely to feel a sense of belonging to the Lodge. The views of the Brethren are actively sought and considered, decisions are taken based on their input, and good management is guaranteed through a plan of succession under which officers fully participate in the management of the Lodge as they progress through the line.

In certain instances, we must inspire our Brethren to become more involved in Lodge activities, while in other instances, we must encourage them to share management of these Lodge activities with the new Brethren. To do this, of course, the Lodge must have activities. These activities should be the result of a carefully conceived plan, developed by the Master, with assistance from Lodge Officers and Past Masters that strives for an interesting balance between degree and social programs, and provides for optimum participation by Lodge Members.

One of our ancient regulations is that it is not in the power of any man or body of men to make innovation in the body of Masonry; however, change is inevitable. What often gets lost in the heat of debate is the nature of the change. Landmarks, Tenets, Principles and the Ritual require consistency for the Craft to survive. Equally important for survival are the changes necessary to keep the Craft current with modern society. We have entered a new millennium, but without the capacity to recognize the need to modernize our philosophies and bring them forward into the 21st century, there is little likelihood that the truly important unalterable principles will have the fertile ground in which to survive and grow. Certain changes will be necessary if the basic philosophy of Freemasonry is to endure beyond its 300th Anniversary.

The paradox we all face as Masons is to preserve that which cannot be changed without compromising the very foundation of Freemasonry. While overcoming the conflict and bickering over those changes that must be made to ensure the continued existence of what each and every Mason deems inviolable: the preservation of a healthy Masonic Order "until time shall be no more" is the challenge of every Mason.

The veil of secrecy that, in the past, had surrounded and screened out the curiosity and perhaps interest of our family, friends and the community, is being lifted. Masonry is emerging from its own 'dark age' at a time when society fears more and more the unknown. The more society understands about Masons and their contributions to the community, the stronger the Fraternity will become.

Lodge Management must also move forward. Gone are the "heydays" of Masonic growth following both World Wars when, with the fraternal feeling for their comrades-at-arms still in their hearts, many returning veterans sought something to erase the agony and, to fill the gap, turned to Freemasonry. This is an age of independence. The "Baby Boomers" and "Generation Xers" all have their own distinct views of life in general, and how much they wish to participate. Their sense of belonging differs from past generations. They are not content to sit on the sidelines. They are active or they are gone. To attract these generations, who represent the future of our Craft, Freemasonry must adapt to accommodate their philosophies to include a voice in the operation of the Lodge and expand to include their families in Lodge activities.

We must strive for Total Quality Masonry. The pursuit of excellence in all our Masonic activities, including improving the quality of our membership. While the values of Masonry remain untarnished, many of the old ways of doing things must be re-evaluated to ensure

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they are still valid in today's world. If changes are necessary, then changes must be made, including modernizing our managerial philosophies, as outlined in the Section entitled: "Finding the Right Type of Lodge Management".

As Masons, we are admonished to "... work together with that love and harmony which should at all times characterize Freemasonry"... and so we should. This, however, is often easier said than done. Often differences of opinion can harden resolve on differing courses of action to such a degree that confrontation arises, making a common sense compromise difficult. Not only is this "non-Masonic", it creates a state of stagnation within the Lodge, and everyone suffers.

Change is never easy, and it can be accompanied by conflict. Differing points of view must be assessed and the merits of each fully considered. Proponents of differing opinions must be given their say. Frequently the course of action to follow lies between the extremes. Often, the solution evolves through compromise. When required, a mediator, whether it is the Master or some skilled Brother chairing a Committee, must possess the wisdom of Solomon and the patience of Job. He must be fair in his assessment of the different views and possess the skills of a good negotiator in achieving a solution that all parties can accept for the harmony of the Lodge. This is the essence of managing change.

Mediating consensus from conflicting points of view is a challenge. This is particularly true in the management of a Lodge, where opposing views often agree on only two factors. Each has the Lodge's best interests at heart, and each believes that its point of view is best for the Lodge and its members. To achieve consensus on a course of action that addresses the problem and permits the Lodge to move forward, a mediator must strive for a compromise to be reached. Often, this is not midway between the opposing views (half a change may be worse than no change at all). The Lodge must move forward.

The best interests of the future well-being of the Lodge must be paramount. Any change must strengthen the Lodge. In creating the proper atmosphere for consultation, every effort should be made to improve the interaction between the parties. Each party must be made more respectful of the opposing position. The key to success is communication, "are all parties listening"? Are they open to compromise? Do they fully understand the total picture, including the various options? Are their interests shared, compatible, or conflicting? It is the role of the mediator to get answers to these questions and to assess the alternatives. What are they? Can they be improved upon? Are there other possibilities?

When opposing parties try to bargain over positions, they tend to lock themselves into their positions. The more each clarifies its position and defends it against attack, the more committed they become to it. A principled mediation method of focusing on basic interests, mutually satisfying options and fair standards typically results in a wise agreement by reaching a gradual consensus on a joint decision efficiently.

Step 4: Work the Plan

Where do you want to go? There are many ways to keep in touch with your Brethren. Be creative - plan variety and strive for an interesting balance between your degree and social programs. Degree work is fine, especially if you are blessed with a number of candidates. Remember, "all work and no play makes Johnny a dull boy" - it also makes him a bored Mason, one who could turn away to other pursuits of enjoyment, and he may be lost to the Lodge forever.

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If you have lots of degree work, vary it, so that there are different degrees at regular meetings. Intersperse special interest programs. Invite other Lodges to participate. It is important that the Lodge Officers know their work and work the three degrees, even if you have to borrow candidates from other Lodges, or exemplify certain degrees for other Lodges.

This responsibility having been addressed, consider other special programs such as:

- ✓ A Past Masters Night, honoring an active Past Master by allowing him to conduct a degree team of other Past Masters.
- ✓ A Brothers Night, with a Past Master conducting a Degree Team consisting of Brethren. What a wonderful way to keep their interest up and to uncover likely Officer material.
- ✓ Special Degree Teams, such as York or Scottish Rite or the Masters Group of some specific year.
- ✓ Fraternal Visits by Lodges, either from within or outside your own District or Grand Jurisdiction with the visitors doing the work of the evening.
- ✓ Special programs of Masonic Education and/or Instruction.
- ✓ Special non-Masonic programs in the Lodge Room for family and friends of Members.
- ✓ An Awards Night for the presentation of long service and other pins and certificates.
- ✓ Social functions, such as the annual Ladies Night, Christmas Party, barbecue, special functions for Brothers and their families, and don't forget the widows of deceased Brethren.

In preparing your long-range plan for the year, take full advantage of the expertise available. Just because you are the leader does not mean that you must carry the ball at each meeting. Use the resources of your own Lodge and do not forget to utilize the District talent available to you. There are District Officers in a number of disciplines who are eager for the opportunity to participate in Lodge meetings.

Step 5: Measure Success

What Constitutes Effectiveness?

For the purpose of this plan, effectiveness can be defined as "the attainment of the desired or intended outcomes of your Lodge Retention Plan." What are the goals and objectives of your Plan? Are they vague or specific? The more specific your goals, the easier it will be for your Lodge to identify the desired outcomes. Thereby determining what you need to measure and evaluate as the Plan is implemented.

How Is Effectiveness Measured?

A well-designed and properly executed Plan identifies multiple goals, based on the assessment of Lodge needs. Multiple goals probably mean multiple effectiveness measures, but not necessarily. Lodges with more modest objectives may feel that a single measure, such as attendance at the monthly Communication, is a sufficient basis for assessing effectiveness. However, if your Lodge is interested in tracking multiple outcomes (e.g., sideline attendance, number of Brethren attending Lodge of Instruction, number of non-Masonic guests attending Lodge events), you will need to take that into account when developing your effectiveness assessments.

What goals were identified in your Lodge's Plan? If the primary goal is to increase sideline attendance at the monthly Communication, a logical way to assess your Plan's

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effectiveness is to determine how many sideline attendees your Lodge had, on average, for the 3-6 months prior to Plan implementation, and then track monthly attendance in the future. You can use the absolute numbers, or you could state the attendance as a percentage of total Lodge members. At any future time, you have the ability to calculate changes relative to the pre-Plan time period.

Measurement Methods

1. Establish Your Baseline: What Makes Sense?

It's important to set an appropriate baseline against which to measure progress toward goals. The problem is that Lodges often do not have the data at hand to know how to set that baseline. For example, while many Lodges keep monthly attendance (which is now requested on the Lodge Secretary's Monthly Report to Grand Lodge), some have not done so. Thus, these Lodges may have to estimate their attendance in the months prior to the implementation of their Lodge Retention Plan if they want to track changes in attendance. Keep these kinds of issues in mind when deciding what outcomes you want to track – you may have a hard time collecting historical data against which your future efforts can be compared. If you don't have historical data, don't worry – you're better off moving ahead with your Plan and collecting whatever data you can than doing nothing!

The time frame over which your baseline is determined may be important to consider. For example, if you want to track changes in sideline attendance over time, you may want to consider if there are seasonal variations (e.g., "snow birds" who are not around in the Winter months), which should be taken into account. In that case, it may make sense to develop a three- or six-month average against which to compare. Alternatively, you could compare the current month's attendance to the same month in previous years, much as department stores do to assess changes in sales.

2. Conduct Interim Assessments: How Often?

That's up to you. There are no firm rules to follow in this regard. Just beware of the "dieter's dilemma," where constant scale watching (or, in this case, attention to data) can be counter-productive. You may want to track some outcomes on a monthly basis, and others on a less frequent basis, such as quarterly.

3. Report Findings to Your Lodge

It is essential that results be reported back to your Lodge Brethren in a timely fashion. Again, there are no firm guidelines for how often, or how detailed, these reports need to be. One strategy for reporting this information is via the Monthly Communication. This ensures that the information is delivered not just to those who attend Lodge, but also to everyone (even out-of-state Brothers and those who belong to neighboring Lodges who may receive courtesy copies of your Lodge's notice).

Summary

As was noted in the Introduction to this manual, the ideas presented here are not intended to be the be-all and end-all of membership retention. The fundamental premise of the program outlined here is simple:

- Identify the issues or problems facing your Lodge
- Assess the means at your disposal (i.e., strengths and weaknesses) to address these issues

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- Develop a workable plan with measurable goals
- Work the plan
- Evaluate what worked (and what didn't), and the resulting progress toward goals

We hope the ideas and concepts presented in these pages will help you formulate a strategy that works wonders in your Lodge. Best of luck as you and your Lodge embark on a successful future!