



UNITED GRAND LODGE
OF ENGLAND

The Members' Pathway

Attracting Members - Growing Lodges

How To Use It

For Lodge Almoners

Self Study Workbook



Contents

- 1. Introduction**
- 2. How to use this Workbook**
- 3. How to use the Member's Pathway**

Introduction

Before using this workbook, please complete the 'Members' Pathway Introduction For All' workbook, which explains the Members' Pathway overall and why we need it.

This self study pack provides a summary of how you should use the Members' Pathway as an Almoner. It is available to any current, acting or potential Almoner.

There is a specific additional Self Study Module for the role of LMO and Mentors.

The material contained in these guides are also available as Zoom or In Person events. Consult your PPO for details

The Guide is comprised of :

1. This Workbook
2. Your set of Keys to access the Members' Pathway guides
3. A Feedback Form

Please make sure you have your set of Keys open on your device for best effect.

How To Use This Workbook

Work through this guide at your own speed.

When you have completed it please complete and return the feedback form to your PPO team. You may receive a follow up call to discuss any matters arising.

It is recommended that you take one at a time with a break in between.

The estimated time for completion is 70 mins if you work through in one sitting.

- Module 1 – What is RETRIEVE - 30 mins
- Module 2 – Quiz & Answers - 40 mins

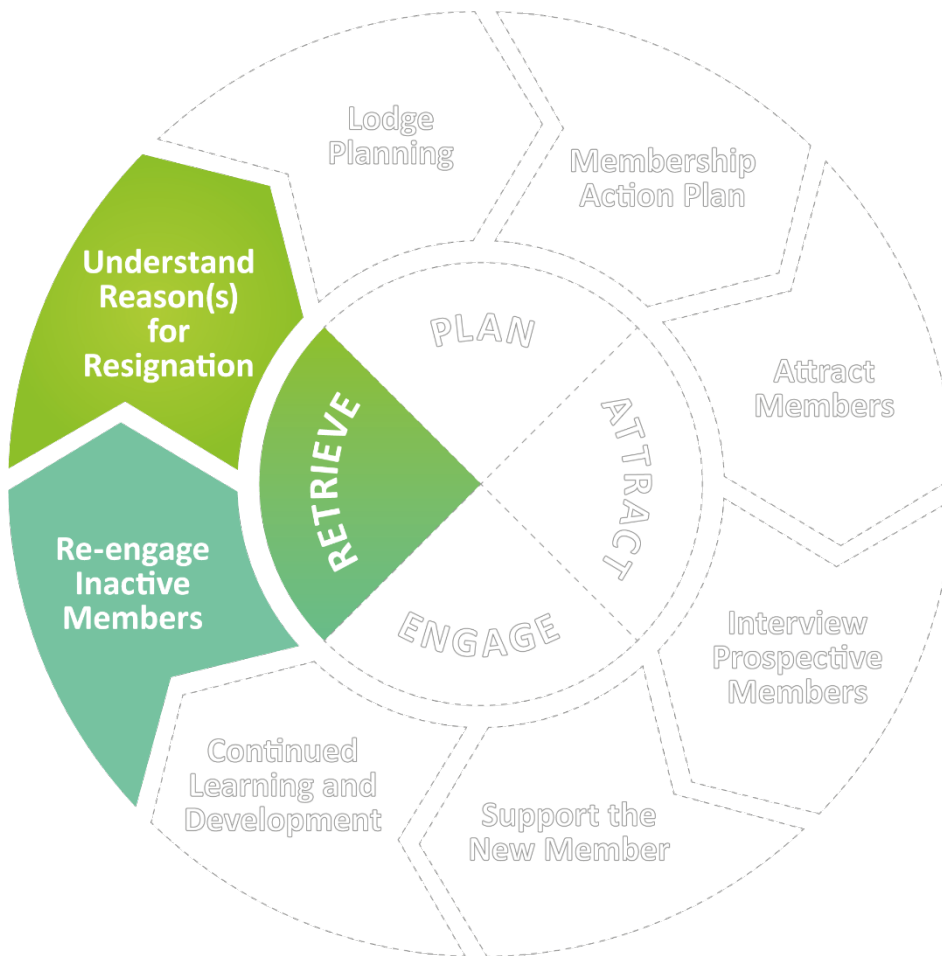
Course Objectives

By the end of this course you will be able to:

- Describe your Members' Pathway role to others
- Use the RETRIEVE Level 3 Guides
- Adapt or Adopt this into your Province current practices
- Start working with the Lodge Membership Team (LMT)

What is *RETRIEVE*?

Level 1 – RETRIEVE



Starts with

- Signs of Member losing interest
- Member Resigning or
- Member moving away (or in)

Progresses Through

- Discuss issues with the member
- Fixing the problem
- Learning the lessons for the future
- Arrange for Lodge/Province move

Ends With

- Re-engaged member
- Re-located member
- Lessons learnt for Lodge improvement

Level 2 – Quick Start Guide

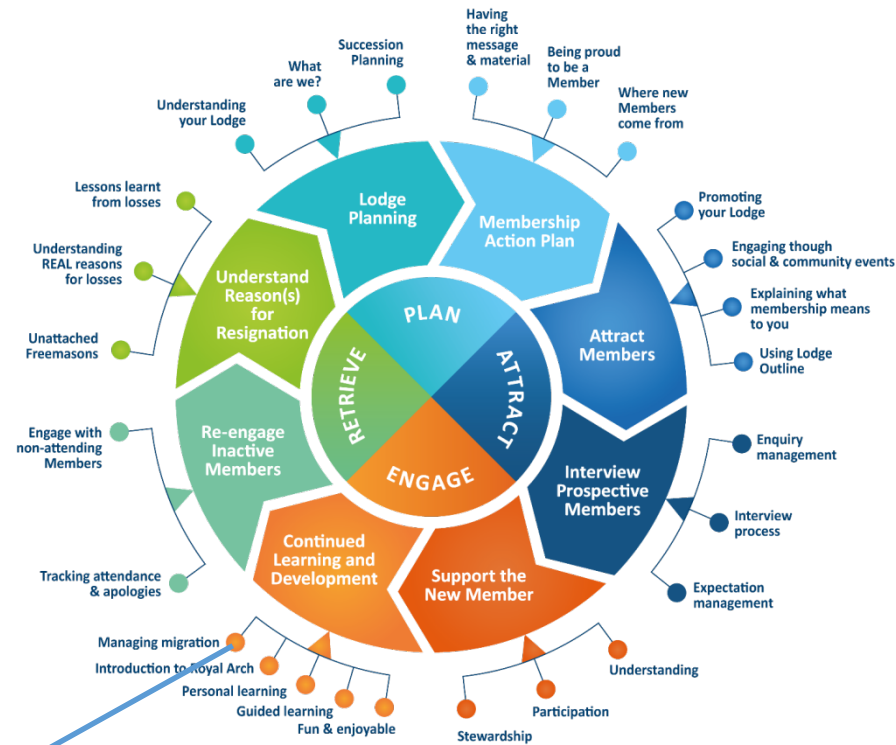
Threads:

Each of the elements are summarised by a number of brief descriptions known as Threads, shown here around the perimeter

A Quick Start Guide explaining all the Threads is available.



Level 3 – RETRIEVE Guide



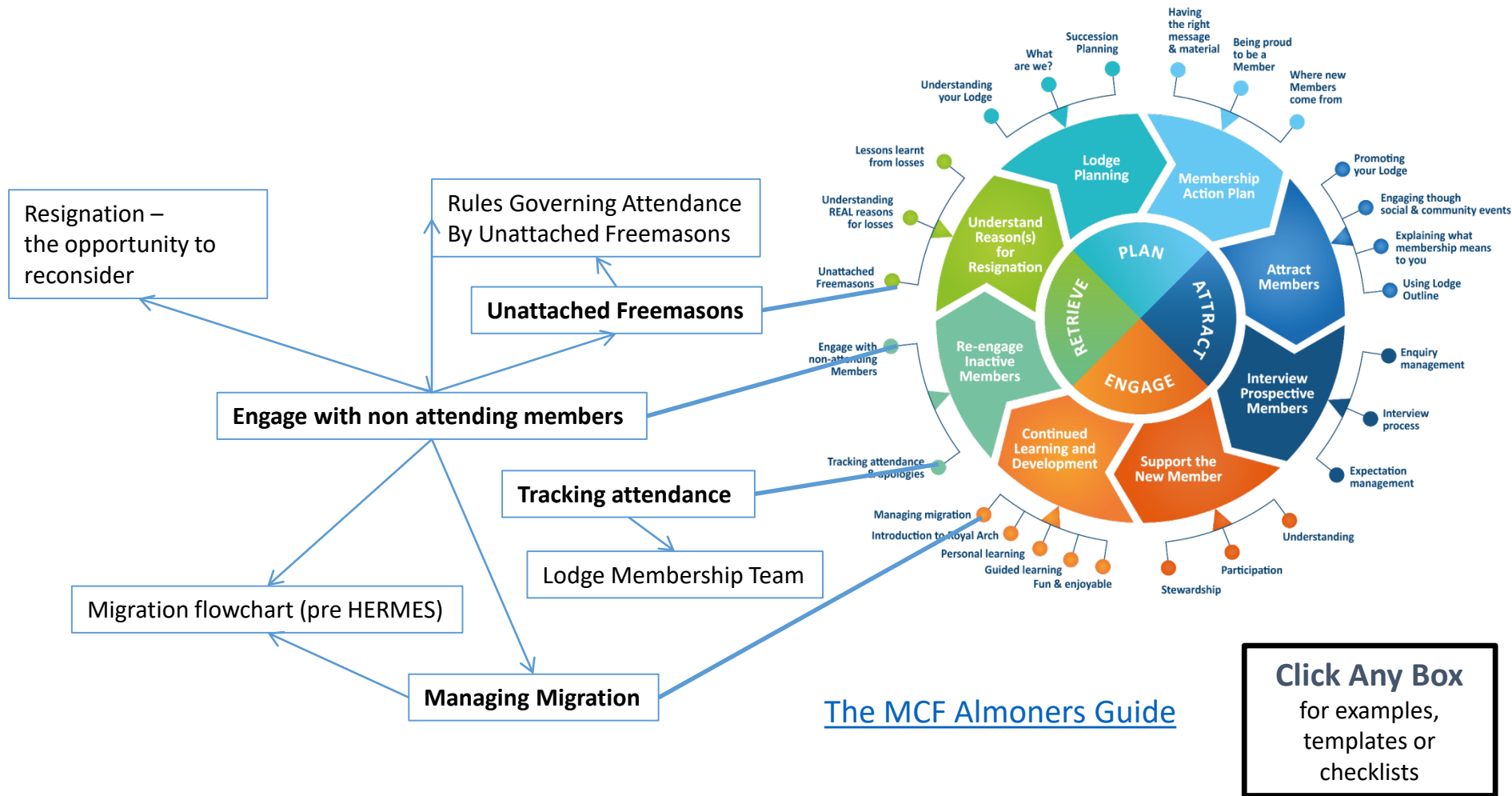
Migration flowchart (pre HERMES)

Managing Migration

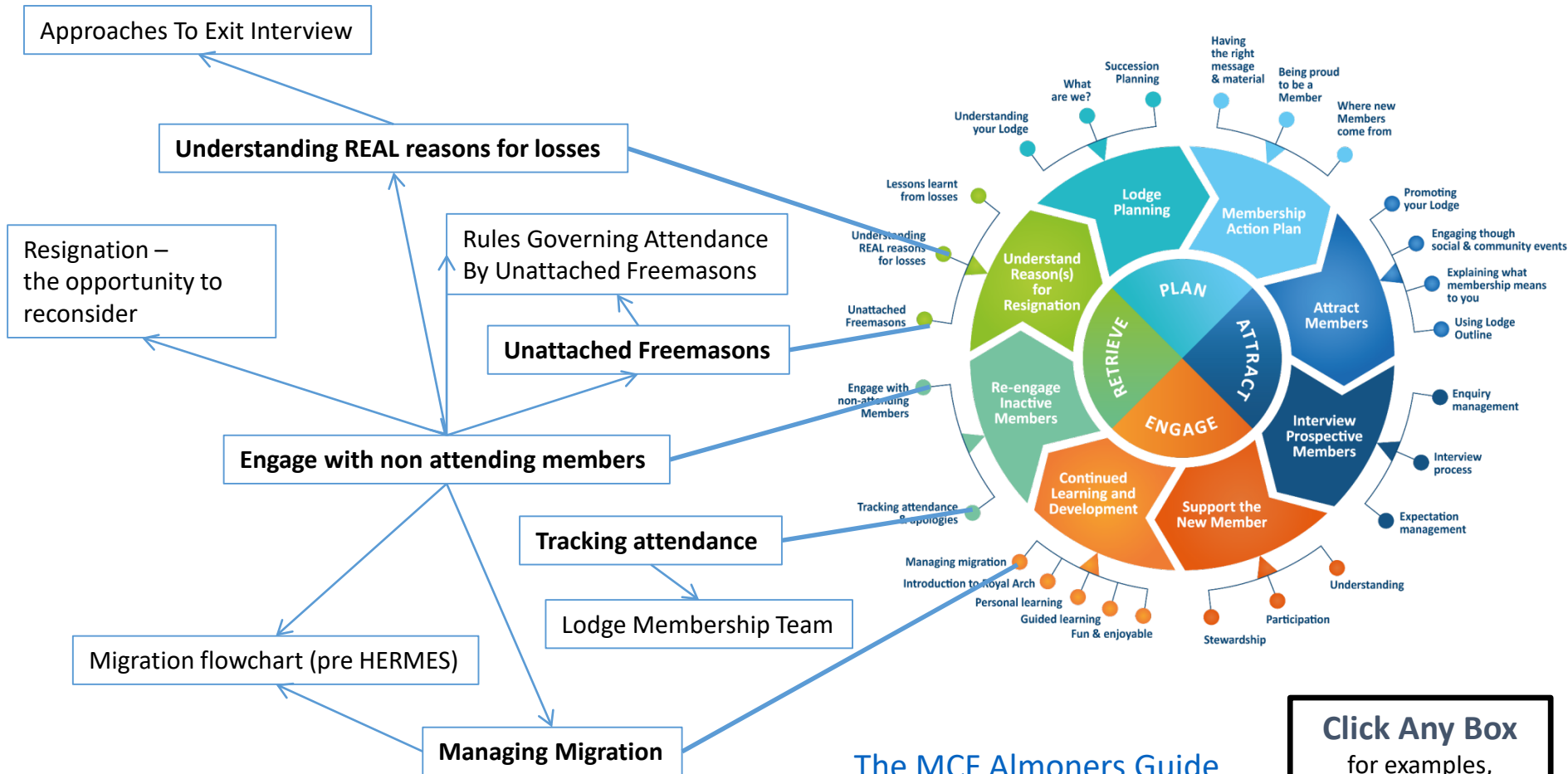
[The MCF Almoners Guide](#)

Click Any Box
for examples,
templates or
checklists

Level 3 – RETRIEVE Guide

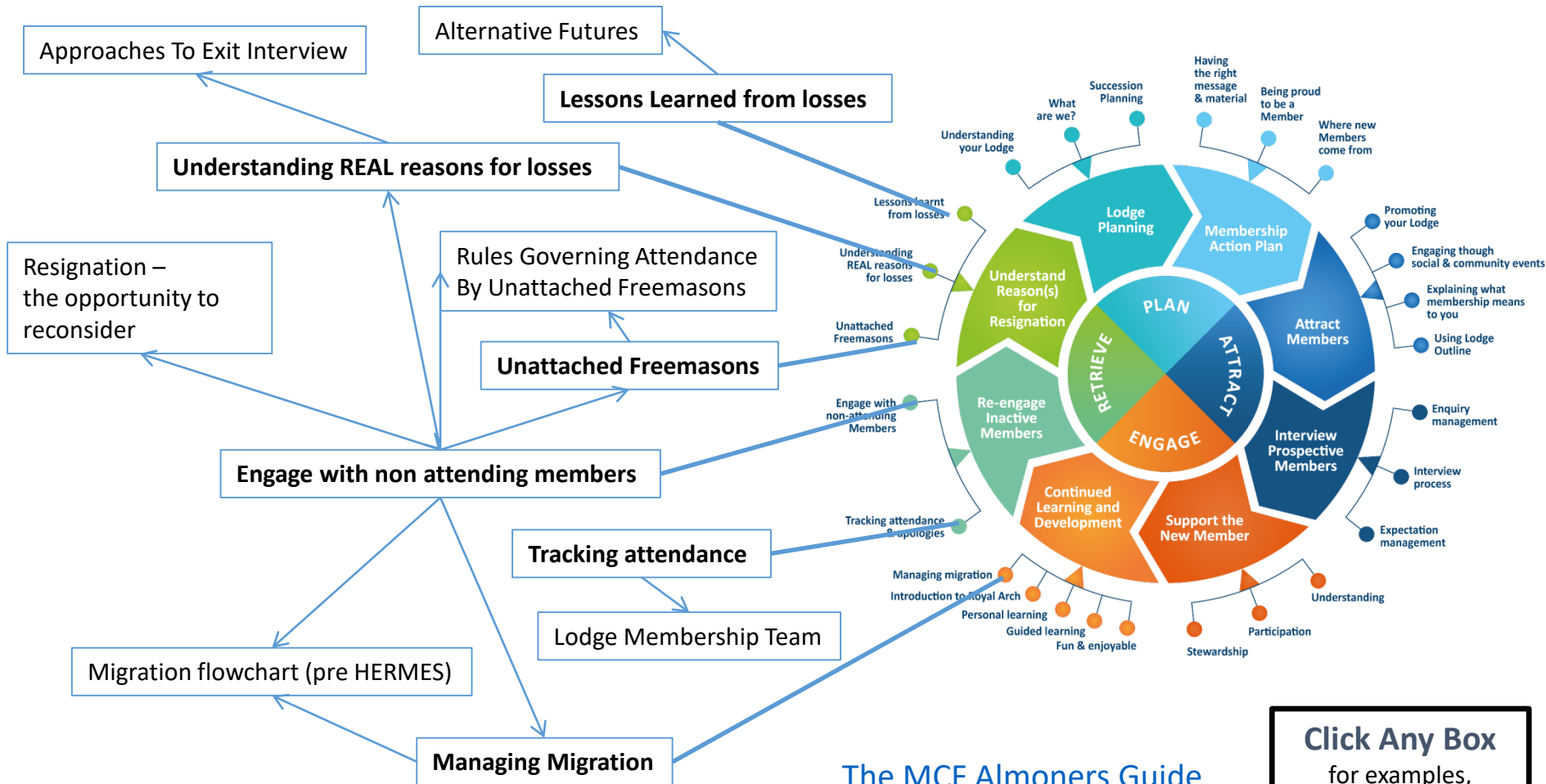


Level 3 – RETRIEVE Guide



Click Any Box for examples, templates or checklists

Level 3 – RETRIEVE Guide



Click Any Box
for examples,
templates or
checklists

Level 3 – Migration Flowchart

These documents incorporate work and ideas from a number of iterations of the UG... 1 / 2 | - 100% + | [] []



1



2



The Members' Pathway: Level 3

ENGAGE > Continued Learning and Development > Managing Migration

MIGRATION FLOW CHART (prior to the launch of Hermes)

1 *Lodge Secretary.*
A notifiable change of a member's personal data is given to the Lodge Secretary. Current system requires him to send this information to the Provincial Office, either by post, online or email, ASAP using the approved format.



2 *Provincial Office (PrOff)*
Processes the Adelphi updates and considers if any further action is required in respect of Member Migration and takes appropriate action below.



Note: The Member Migration Process is triggered at this point.

*DPO = Designated Provincial Officer
(Will vary according to Province/District)*

*PrOff = Provincial Office
MMP = Member Migration Process*



3 *"RESIGNATION"*
DPO is notified by PrOff to conduct exit interview for reason of Resignation. If due to moving away DPO will recommend the Member Migration process (MMP). If the member accepts, the MMP starts. All other reasons for Resignation should be processed

4 *"ADDRESS CHANGE"*
If change of address is significant and likely to involve moving away, PrOff will inform the DPO to make contact with the member and recommend the Membership Migration Process. If the member accepts, the MMP starts.



5 Allocated 'Home' DPO finalises details with member and, via his PrOff makes contact with 'Target' DPO and passes on details required. Both DPOs record a new MMP event in an 'Activity Register'.

Almoners Role - as per MCF website

1. Maintaining the pastoral care of Brethren and their families by keeping in regular contact – this ensures they know where to turn in times of need and feel comfortable doing so
2. Listening carefully to the needs of Brethren and their dependants whilst also managing their expectations.
3. Highlighting the support available from the state, charities and other organisations
4. Signposting the help available from the Masonic Charitable Foundation and local Masonic charities
5. Recognising and fighting loneliness to resolve the problem before it gets out of control. This includes maintaining contact with widowed partners and signposting to local support groups. • Making all new Members welcome in conjunction with the Proposer, Secunder and Lodge Mentor. • Working closely with the Lodge Charity Steward and Lodge Mentor
6. Noting the non-attendance of Lodge Members and following up as necessary
7. Keeping in touch with Brethren who have resigned or have been 'lost', whenever possible
8. Identifying the contact details of a friend or relative of a vulnerable person who can be contacted in emergencies.
9. Encouraging other Members of the Lodge to share the duties of the Almoner (e.g. assisting with visits to widowed partners)
10. Keeping the Lodge updated on a Brethren or dependant's circumstances at frequent intervals.

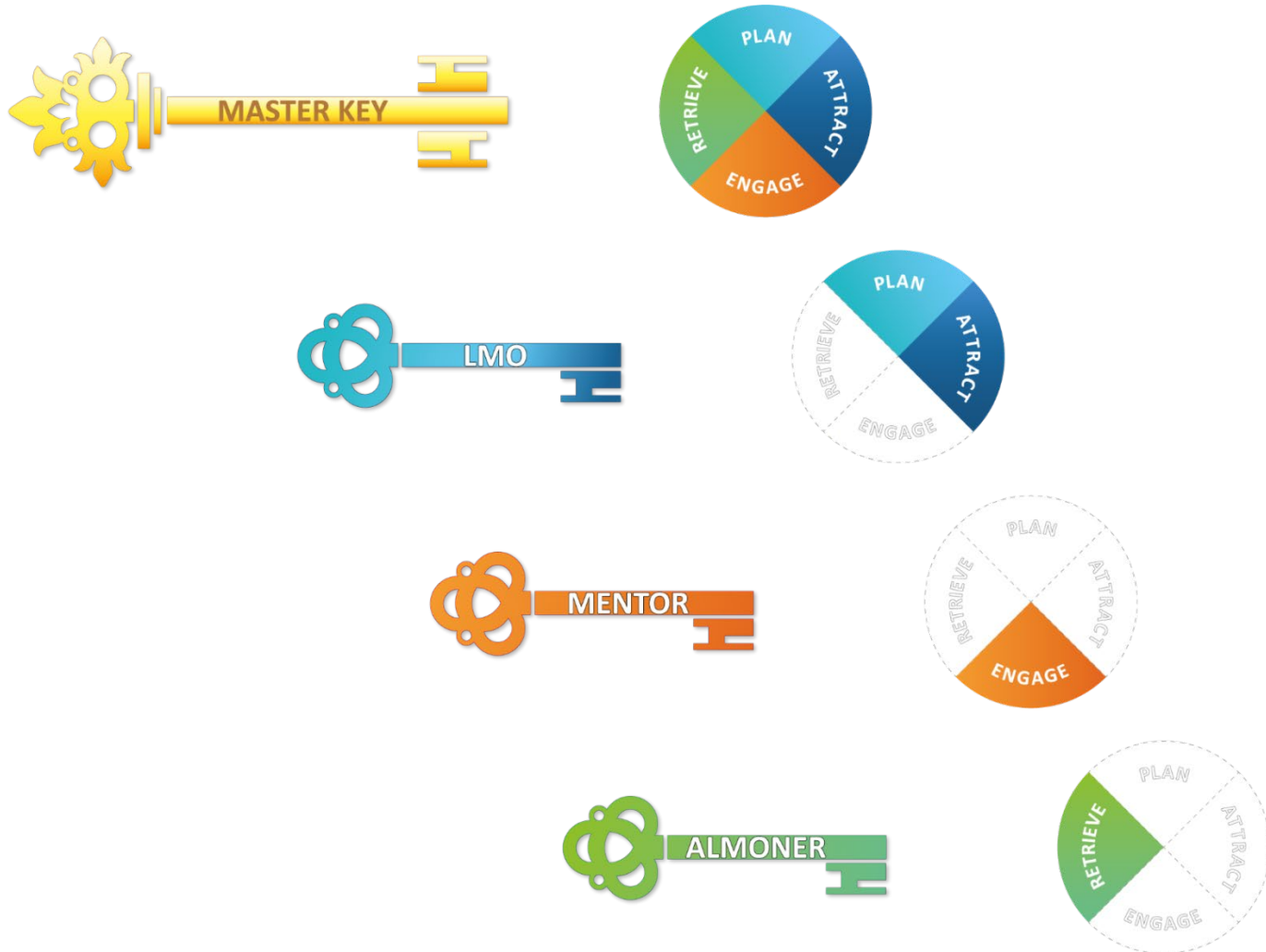
Almoners Role – Members' Pathway Specific

1. Maintaining the pastoral care of Brethren and their families by keeping in regular contact – this ensures they know where to turn in times of need and feel comfortable doing so
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3. Highlighting the support available from the state, charities and other organisations
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Plus new Extras

- A. *Managing Migration in/out due to relocation of a Mason*
- B. *Approach unattached freemasons*
- C. *Understand REAL reasons for resignation (handled by Prov Almoner?)*
- D. *Learn from the REAL REASONS (inform Lodge to update Lodge Plan to avoid repetition)*

Set of Keys



Responsibilities

Roles in Red
for suggestion only



Who is involved?

'Everyone' but especially the LMO, Mentor, Almoner WM, Sec & DC working together as the 'Lodge Membership Team'

All the PPOs engaged:

PMO
ProvGMen
Prov Almoner

The Lodge Membership Team

LMT – Lodge Membership Team

- LMO, Mentor, Almoner
- WM, Secretary & DC
- Other participants as suits your Lodge

Assisted and Supported by the PPO Team

PPO – Provincial Pathway Officer

- Provincial Membership Officer
- Provincial Grand Mentor
- Provincial Grand Almoner
- Other participants as suits your Province



Teamwork

Everybody in the Lodge has a part to play in attracting new members and growing the Lodge.

The Lodge Membership Team (LMT) in particular should regularly speak, meet, share and support each other:

- WM, Secretary, DC
- Membership Officer, Mentor & Almoner

And the Lodge Committee should discuss progress with the Members' Pathway and support their LMT

Together

Everyone

Achieves

More

Adopt/Adapt

Your Province may already have :

- a Provincial and Lodge Membership Officer role in place
- an approach to the original Members' Pathway
- other initiatives you may wish to fold into this approach

Take care to consult your Provincial Pathway team to check if there are any specific tools or techniques that you need to adapt as well as adopting this approach

Especially consult your Provincial Pathway team on the matter of latest good practice available from the UGLE Brand Centre.



Quiz Questions – RETRIEVE

Use the Level 3 RETRIEVE guide to answer these questions

1. How many warning signs are there that a Brother may be thinking about resigning?
2. How many prompts are there to get the brother discussing his experience of the Lodge?
3. How many detailed approaches are provided to conduct an Exit Interview?
4. Which rule in the B of C deals with resignations?
5. How many steps are there in the Migration process?
6. How many ways are there to keep in touch with a former member?
7. How many suggestions are made to learn from membership losses?
8. What are the additional Almoner Members' Pathway duties?
 - a. Managing Migration in/out due to relocation of a Mason
 - b. Approach unattached freemasons
 - c. Understand REAL reasons for resignation (handled by Prov Almoner?)
 - d. Learn from the REAL REASONS (inform Lodge to update Lodge Plan to avoid repetition)

Quiz Answers – RETRIEVE

1. How many warning signs are there that a Brother may be thinking about resigning?
- **11, listed in ENGAGE WITH NON ATTENDING MEMBERS**
2. How many prompts are there to get the brother discussing his experience of the Lodge?
- **5, listed in the Exit Interview**
3. How many detailed approaches are provided to conduct an Exit Interview?
- **2, detailed in Approaches To The Exit Interview**
4. Which rule in the B of C deals with resignations?
- **183, listed in Resignation – the Opportunity to Reconsider**
5. How many steps are there in the Migration process?
- **10, listed in the Migration Flowchart**
6. How many ways are there to keep in touch with a former member?
- **7, listed in UNATTACHED FREEMASONS**
7. How many suggestions are made to learn from membership losses?
- **8, listed in Lessons Learned From Losses**
8. What are the additional Almoner Members' Pathway duties?
 - a. Managing Migration in/out due to relocation of a Mason
 - b. Approach unattached freemasons
 - c. Understand REAL reasons for resignation (handled by Prov Almoner?)
 - d. Learn from the REAL REASONS (inform Lodge to update Lodge Plan to avoid repetition)

Summary

You now:

- understand why we need the Members' Pathway
- are able to describe the Hub & Elements
- are able to use RETRIEVE at Level 3

Please now return to your Lodge, work as a team and encourage everyone to adopt or adapt to the Members' Pathway Hub & Elements

Please check you have received your set of access Keys to the guides

Please complete and return the Course Feedback form as soon as possible.



**Any problems or for further details
contact your PPO Team**

**Please Complete and Return the
Feedback Form by Email**