THE JOURNEY OF A FREEMASON
An Introduction to the Members’ Pathway
INTRODUCTION

In common with all membership organisations, the future of Freemasonry depends upon it being able to introduce and retain members who will be committed, who will contribute to their Lodges and who will enjoy a lasting membership.

Masonic ritual defines very clearly the qualifications for membership and Lodges throughout the constitution seek to find and introduce suitable men who will enhance their Lodge. Similarly, the Book of Constitutions defines the administrative and regulatory procedures for introducing new members. What we have not had is a set of practical guidelines, tools and techniques to help Lodges plan how to do this in an effective manner. Some Lodges are very successful at finding and keeping suitable new members while others clearly struggle to do so.

Now, in the “Members’ Pathway”, (the Pathway) the Membership Focus Group (MFG) has collated existing good practice from many different Masonic and other sources and compiled a set of tools for Lodges to use to help them to:

1. Attract suitable men to Freemasonry
2. Satisfy themselves that those who are attracted to Freemasonry are suited to their Lodge
3. Introduce new members in a planned and considered manner
4. Support and encourage new members in their early years
5. Educate new members so that they grow to become committed and lasting members
6. Address issues that underpin early resignations.

The purpose of this booklet is to introduce the Pathway and to outline its structure and use.

The MFG is a group of experienced Freemasons from different backgrounds and with different skills, brought together under the authority of the Board of General Purposes (BGP) to look at the future of the Craft. The MFG has studied patterns of membership, identified good practice and developed responses to membership trends to ensure the Craft is fit for the future. The approaches and tools offered in the Pathway have all been used, tried and tested so we know that they work. Now, for the first time they have been brought together in one package for Lodges to use.

Like all toolkits we do not expect you to use every idea or technique. But we do know that, if you follow the process outlined in the Pathway, you are more likely to introduce men who will be suited to Freemasonry and who will remain as members.

Throughout the set of Pathway materials we have adopted the premise that the quality of the candidate is supreme. By quality we mean men who meet our membership requirements, who are well suited to the Craft and who we strongly believe will develop to become committed members who contribute to their Lodge. Our objective is to help Lodges to find and introduce such men. We wish to be selective in our search for men of integrity, even if the price is that we recruit fewer men than we otherwise might hope.

Equally, we ask Lodges to look at themselves, their strengths and weaknesses, their likely sources of potential candidates and their future viability. Lodges will not find in these resources a panacea that will guarantee their future survival. We fully expect there may be fewer Lodges in the future and recognise that, as with all evolutionary processes, the Lodges that survive and thrive will be those that continue to offer a good and enjoyable Masonic experience while adapting to the world around them. It is worth highlighting that our oldest Lodges, including three of the four that formed the first Grand Lodge in 1717, are still with us precisely because, over the years, they have balanced tradition with the need for change and adapted their practices accordingly.
Recent research into wider patterns of membership in clubs, societies and organisations (see Appendix A) shows that:

- Approximately 2.7 million men in England regularly give their time to clubs, societies and organisations related to hobbies, social activities and recreation.
- Levels of participation have returned to the high point reached before the 2008 economic crisis.
- Age, location and economic activity need not be barriers to joining.
- Freemasonry can satisfy the hopes and expectations expressed by those who do join organisations.

Therefore, there is good reason to be optimistic about the future.

Finally, in the Pathway we are introducing some ideas, approaches, language and roles that may be quite new to many of us, at least in a Masonic context. We ask you to keep an open mind, to be willing to put these ideas into practice and to work together with others to achieve our goal of introducing good men into Freemasonry so that Freemasonry can continue to make good men better.

**THE PATHWAY IN OVERVIEW**

The Pathway is a series of steps for a Lodge to follow to help it to attract, recruit, select, introduce and retain good quality candidates to the Craft. The steps are:

For all Lodges:

1. Profiling the Lodge and its ideal candidates  
   *When a man is known by existing members:*
   2. Identifying prospective candidates
   3. Approaching prospective candidates  
   *When a man is not previously known by existing members:*
   4. Responding to enquiries from potential candidates

For all prospective and potential candidates:

5. Preparing the prospective candidate for interview  
6. Interviewing the applicant

7. Preparing the candidate for initiation  
8. Supporting the new Freemason  
9. Educating and developing our members  
10. Retaining our members  
11. Retrieving members

Co-ordinated by the Lodge Membership Officer

Co-ordinated by the Lodge Mentor

Co-ordinated by the Province

The language we use to describe possible future members changes as the Pathway progresses. At the start we create a profile of the “ideal candidate” for our Lodge (Step 1). The “ideal candidate” profile describes a man who is not only suitable as a candidate for Freemasonry but whom we believe is likely to suit our Lodge. We use that profile to identify an actual man (Step 2) who can then be thought of as a “prospective candidate”. Of course we may identify more than one prospective candidate at this point. The next step is to approach him to find out whether he might be interested in Freemasonry (Step 3) and to help him to learn enough about us to decide whether he wishes to apply for membership. An alternative route is for a “potential candidate” to
approach us (Step 4) with an expression of interest. Such approaches should receive an early response, be validated to ensure their sincerity and then referred to a Lodge or Lodges that appear to be suitable for them to take further.

Once we have an expression of interest, we can progress to discussing Freemasonry with him and vetting him (Step 5), to determine whether he meets the qualifications for membership. If both parties wish to proceed, he is now an “applicant”. He completes a Grand Lodge Registration Form and goes to formal interview (Step 6). It is only if the Interview Panel agrees that he would be suitable as a Freemason and as a member of our Lodge that he becomes a “candidate” and is prepared for initiation (Step 7).

Until this point, the activities on the Pathway will have been co-ordinated by a Lodge Membership Officer, whose role is explained later. Step 7 is the start of the mentoring process and so responsibility for co-ordinating Pathway activities now passes to the Lodge Mentor, supported by Personal Mentors and the candidate’s sponsors.

Of course, as soon as a candidate has taken his obligation he is a Freemason and a “member”. He should no longer be referred to as a candidate but rather as a “Brother”. We might, for that meeting only, refer to him as an “initiate”. We prefer NOT to refer to new members as “young” or “junior”. Whilst both might be true in one or more senses, such language is also felt by some new members – especially those of advanced years with many accomplishments in life behind them – to be patronising. Instead we refer to them as “new members” or “newer members”.

The Pathway progresses with the Personal Mentor, whether he be a sponsor or another experienced Freemason, providing the information, contact and support tailored to the new member’s individual needs as he goes through the ceremonies and experiences things for the first time (Step 8). In parallel, the new member will be introduced and exposed to a number of educational and developmental experiences, provided by Lodge officers and perhaps others outside of the Lodge (Step 9).

Mentoring has been found to improve the retention of members in the Craft. However, retention also appears on the Pathway (Step 10) as a series of both positive activities to be undertaken to help the new member to grow in his commitment and preventive activities to respond to any signs of disinterest. Finally, in the regrettable event that a member does submit his resignation, there are activities to retrieve members (Step 11), whether it be within the same Lodge or by joining another, perhaps more compatible, one.

POSITIVE PUBLIC IMAGE

The Pathway will be most successful if Freemasonry enjoys a positive public image and good local reputation. Lodges, supported by their Metropolitan / Provincial / District Grand Lodges can work together to create improved public awareness and visibility. Most people join membership organisations after having been asked. Very few approach the organisation themselves without first knowing that they are likely to receive a warm response. Therefore, while a positive public image may generate some approaches from potential candidates, it will not be sufficient to sustain Lodges in the future. However, if a man when approached already has an awareness of local Freemasonry, and sees it in a good light, he is more likely to respond to an approach, express some interest and want to know more. Therefore, a positive public image is the necessary foundation upon which the Pathway is built but is not part of it. The MFG is leading other projects, and creating other resources, to help us to develop our public image.
ROLES AND RESPONSIBILITIES IN THE PATHWAY

All members of a Lodge are responsible for introducing new members, for helping to retain them by making them feel welcome and supported, and for seeking to retrieve those who resign. A number of officers and other members have more specific roles to play in these processes. This section provides a summary of those roles and responsibilities in so far as they relate to the Pathway.

Lodge Membership Officer: A new role, to co-ordinate the Lodge’s activities in the Pathway up to the stage when the Lodge Mentor takes over at Step 7. Leads in the development of a recruitment plan and in supporting sponsors as they introduce prospective candidates. Not a formal Masonic office. Those Lodges that wish to devote particular attention to the recruitment of quality new members should consider appointing a member with the appropriate skills and qualities to this separate role.

Lodge Mentor: Takes over responsibility for overseeing the Pathway from the Lodge Membership Officer immediately after the candidate has been elected, to introduce him to his Personal Mentor so that he may be prepared for initiation. Co-ordinates the Lodge’s activities in the Pathway from Step 7 onwards. Appoints and supports Personal Mentors. Works with other Lodge officers, such as the Secretary, Director of Ceremonies and Almoner, to help new members adjust to and derive enjoyment and satisfaction from membership.

Sponsors: A candidate’s proposer and seconder. Either they identify prospective candidates (Step 2) and make the approach (Step 3) or they respond to an enquiry referred by the Province or made direct to the Lodge (Step 4). Recommend applicants to the Lodge after completing Step 5. May be selected to be the new member’s Personal Mentor, if they have the time and experience to do so. In all cases, continues to support the new member and take a personal interest in his welfare and Masonic development.

Personal Mentor: Provides individual and personal support to candidates and new members, to help them to prepare for and reflect upon ceremonies, to learn about the Craft and to get the best from their membership. May be a sponsor but if the sponsors do not have the time and experience may be another experienced member of the Lodge of similar age and life experience to the candidate.

Lodge Secretary: Completes all administrative tasks throughout the Pathway and as defined in the Book of Constitutions.

Worshipful Master: Signs the Master’s certificate on the Grand Lodge Registration Form and, possibly, letters to applicants and candidates.

Interview Panel: A group of no more than three members of the Lodge who will conduct applicant interviews and, if satisfied, recommend candidates to the Lodge Committee. Any more than three members and the interview could be overwhelming. Although constitutionally the Master is entitled to preside over every committee of the Lodge, we recommend that he delegate the chairmanship of the Interview Panel to the member of the Lodge who is most skilled in interviewing techniques. This will ensure the best quality interview process and experience for the applicant. If there is more than one member with similar current high levels of skills, the Chairman should be the most senior Masonically. The membership of the Panel should be as follows:

- The Chairman of the Interview Panel.
- Two other skilled interviewers.

A training programme is available to help panel members to acquire the key skills.
The Lodge Membership Officer should be present to advise on interview techniques and to ensure the robustness of the interview. The applicant’s sponsors should attend to support him. Neither the Lodge Membership Officer nor the sponsors should be involved in conducting the interview.

**Lodge Committee:** Oversees the work of the Interview Panel and appoints its members. Considers proposals for membership brought to it by the Interview Panel and reports them to the Lodge.

**Lodge Director of Ceremonies:** To ensure that a new member’s development proceeds at the correct pace for him, works with the Lodge Mentor and Personal Mentors to allocate work suitable for each new member, according to their ability, needs and interests.

**Lodge Almoner:** Monitors attendance and works with the Lodge Mentor and Personal Mentors to respond if members appear to be losing interest.

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**THE LODGE MEMBERSHIP OFFICER**

This is a new role. The following role description details his responsibilities and the skills and qualities an ideal Lodge Membership Officer will possess. We recommend that the Lodge Membership Officer is selected and appointed on the basis of the closest match to these skills and qualities. Provincial Membership Officers may be consulted for further guidance and advice.

**Purpose of the role**

To co-ordinate a Lodge’s activities through Steps 1 to 6 of the Pathway; to inspire and encourage all members to seek suitable candidates for Freemasonry; to support those who introduce potential new members to the Lodge and to ensure that only candidates suitable to the particular Lodge are proposed for initiation.

**Main activities**

Trains Lodge members in recruitment techniques, including:

1. Profiling the ideal candidate
2. Identifying prospective candidates
3. What can be said to a prospective candidate
4. What should be said to a prospective candidate
5. Speaking with confidence about membership
6. Being ready to explain one’s experience and enjoyment of Freemasonry.

b. Encourages and helps all members to speak accurately and openly about their membership, with pride and confidence.

c. Compiles a profile of the Lodge and of its ideal candidates, by facilitating discussions and contributions from other members of the Lodge (Step 1).

d. Works with the Lodge Treasurer to supply a detailed breakdown of the costs of joining and membership (see Step 5, appendix A).

e. Maintains a list of prospective candidates (identified at Step 2) and monitors the progress of the Lodge members who have agreed to approach them.

f. Responds to enquiries from prospective candidates not previously known by existing members, and allocates them to sponsors (Step 4).

g. Supports and assists the sponsors when preparing the prospective candidate (Step 3), when completing the application form.

h. Ensures sponsors have completed their preparation of the prospective candidate for interview.

i. Attends the interview (Step 6) as an observer, advises on interviewing techniques and ensures it follows a robust process.
Skills and qualities

a. Good knowledge of the local community and its networks.
b. A skilled interviewer, with good interpersonal skills.
c. A positive and supportive approach, able to inspire and encourage others.
d. A conviction that only men who meet the qualifications for membership and who are suited to the specific Lodge should be admitted to it.
e. Independence and objectivity to ensure the vetting and interviewing of applicants is robust.
f. Has time and availability for the role.
g. Has the strength of character to advise sponsors when appropriate that they should discontinue / terminate the application of an unsuitable applicant.

MONITORING PROGRESS AND REVIEWING SUCCESS

The Pathway is likely to act like a funnel. More names will be listed as prospective candidates (Step 2) than are approached (Step 3) and apply (Step 5). It is likely therefore that more will apply than are initiated. The success of the Pathway will be measured by an increase in quality candidates and the proportion of those who go on to become lasting and committed members, who contribute to their Lodge many years after initiation.

So that they can track and monitor their own progress and so that they can review their success, we ask Lodges to create and maintain records at all stages of the Pathway. The information kept should include key dates and names and may best be recorded in a spreadsheet. It will include:

- The profiles of the Lodge and of the ideal candidate created at Step 1
- The lists of prospective candidates generated at Step 2
- The date when each was first approached and by whom at Step 3
- The names of sponsors allocated to those who approach us at Step 4
- The dates of key meetings and interviews
- The dates when forms were submitted and letters sent
- The outcomes of interviews
- The dates of proposals, ballots and ceremonies
- The dates of mentoring and educational meetings
- Attendance at Lodge meetings, rehearsals, Lodges of Instruction
- Contributions in the Lodge
- Offices held.

The Secretary, Lodge Membership Officer and Lodge Mentor should meet at intervals to review the information and to consider questions such as:

- Are we effective at converting prospective and potential candidates into members?
- At what point do prospective and potential candidates leave the process?
- Is our interviewing thorough and robust?
- Is our mentoring effective?
- Are new members attending regularly?
- Are they contributing in a manner suited to them?
- Is the Lodge meeting new members’ expectations?
- What can we do to improve our management of all aspects of the Pathway?

At intervals Lodges may be asked for data and other contributions to assist with monitoring and review processes at Grand Lodge and Metropolitan / Provincial / District Grand Lodge levels. For reasons of data protection and privacy, any data provided to any person or body outside of the Lodge should not include the names of any person who has not completed a Grand Lodge Registration Form.
SUPPORT FOR THE LODGE

The Pathway should be considered as a whole process. While individual brethren will use the various booklets and any accompanying materials to concentrate on particular steps, it will be important for some members of the Lodge to have the overall picture in mind, and to understand the importance of building the activities of the Pathway on a positive public image and good local reputation. The Lodge Secretary, Membership Officer and Mentor in particular will need to keep this overview and work closely together.

They in turn will be able to seek further support and guidance from their counterparts in Metropolitan / Provincial / District Grand Lodges, who as well as being available for individual discussions, may also arrange training workshops, seminars and other events.

The Board of General Purposes will arrange for the effectiveness of the Pathway to be monitored and reviewed, will collate and disseminate good practice and introduce new guidance as it is developed. Lodges may contribute to this work by submitting their own experiences and ideas via their Metropolitan / Provincial / District Grand Lodges.
APPENDIX A
RESEARCH FROM OUTSIDE OF THE CRAFT

According to the ‘Institute for Volunteering Research’ and the Cabinet Office Community Life Survey, 2013-14:

- 27% of adults in England take part in “formal volunteering” at least once per month. That is, they are involved as a member of a club, society or organisation.
- Of those who do regularly volunteer, 42% are engaged in hobbies, social clubs and recreation. This equates to approximately 2.7 million male adults in England.
- Volunteering peaked in 2005, declined in the period from 2005 to 2012 and has since returned to the 2005 level.
- Volunteering rates are reasonably constant across adult age ranges (from 24% to 33% volunteer once per month) but peak at 33% for those aged 65-74.
- The highest rates of volunteering are found in the south (49% in the South East, 50% in the South West).
- Among those in work, 38% regularly volunteer. Of those who are economically inactive (e.g. retired), 40% regularly volunteer.
- Among those who do not regularly volunteer, the most significant barriers to doing so are work commitments (60%), other commitments (34%), home or child care (31%). 12% said they did not know of any groups seeking members and 14% did not know of opportunities to join. 1% felt too young and 3% felt too old.
- At least 20% of volunteers become active in the work involved in operating their group with 37% of these involved in leading or being on committees, 23% in secretarial work and 55% helping to organise events.
- The top five benefits reported by members of organisations were:
  - ‘A sense of satisfaction from seeing the results’ (97%)
  - ‘I really enjoy it’ (96%)
  - ‘It gives me a sense of personal achievement’ (88%)
  - ‘Meet people and make friends’ (86%)
  - ‘Gives me the chance to do things that I am good at’ (83%)

To summarise:
1. Approximately 2.7 million men in England regularly give their time to clubs, societies and organisations related to hobbies, social activities and recreation
2. Levels of participation have returned to the high point reached before the 2008 economic crisis
3. Age, location and economic activity need not be barriers to joining
4. Freemasonry can satisfy the hopes and expectations expressed by those who do join organisations.

At the time of writing, our current share of this 2.7 million is just under 7%. Therefore, our task is to become visible and attractive, to focus our communications on quality candidates who might suit the Craft and to have in place the means to respond to their expressed interest.
APPENDIX B
BEFORE THE PATHWAY

For the Pathway to be effective it must be built on the foundation of a positive public awareness of Freemasonry. At the individual level a prospective candidate is more likely to respond in a positive manner to an enquiry about his interest in Freemasonry if Freemasonry local to him is visible, respected and has a good reputation. Most of all it must be attractive and hold out the promise of being enjoyable and rewarding, perhaps by offering the benefits listed in the volunteering research.

Prior to the Second World War, Freemasonry in England & Wales was visible to the public. We enjoyed a good reputation and we were highly respected. We were invited to take part in public events and took a leading role in many. Our proceedings were reported in the local press and many of our members were proud to be identified as Freemasons. With the threat of Nazi invasion Freemasonry and Freemasons withdrew from the public eye. We then remained unseen. It was not long before we became the object of suspicion and accusation. When we did not respond to such attacks our detractors suggested we had something to hide.

Today most members of the public know very little of Freemasonry because we have told them very little. With a membership of around 200,000 we are only a small part of society. Most of the adult population think or care very little about Freemasonry. If asked what they do think about us they are likely to respond by repeating what those who have spoken have said. If the loudest voices are those of our detractors that is what the average adult will repeat; rumours, speculation, accusations.

If we want prospective candidates to give a positive response to an approach, we need to replace the voices of our detractors with those of our members speaking openly, accurately and with confidence about their experience and enjoyment of Freemasonry. However, the tools needed to create a positive public awareness of the Craft are not recruitment tools; they are the tools of communication and public relations. As research into patterns of volunteering has shown, most existing members of organisations did not step forward to join or give their time, even when the organisation was well known and highly regarded. Most members of organisations joined because someone asked them. The positive public awareness simply made it easier for one person to ask and for the other person to express an interest.

If we want to attract new members we must be visible and attractive, both nationally and locally. We also need local members to have the confidence to speak about their experience of Freemasonry and to know that it is appropriate for them to do so. In parallel with the development of the Pathway, other work is underway to develop a more positive public awareness of Freemasonry.