

THE MEMBERS' PATHWAY

STEP 1: LODGE PLANNING

STEP GUIDE

This first Step describes how a Lodge can review its situation, consider whether it is attractive to likely members and plan for its future. It is recommended that every Lodge should complete this process periodically, whether it is a successful Lodge or a Lodge that is struggling.

The planning process includes:

1. Creating a Lodge profile (during which members review the Lodge's current situation);
2. Where appropriate, defining and clarifying the qualities and circumstances of men who will be well suited to the Lodge and its membership;
3. Deciding how the Lodge will increase its visibility and promote itself in its local community, and
4. Agreeing a plan of action to develop the Lodge.

Completing this Step will ensure the Lodge is ready to support and retain any new members, as well as provide a basis for identifying prospective candidates (Step 2). "[An Introduction to the Members' Pathway](#)" explains the Pathway and how this Step fits within its framework.

GUIDANCE FOR LODGE MEMBERS

- Many Lodges carry on doing the same thing meeting after meeting. Few spend much time collectively taking stock of their practices and considering their future. It doesn't take long for a strong Lodge to go into decline.
- Periodically, the Lodge should convene a meeting, or meetings, to review its current circumstances and to discuss and plan for its future.
- A good time to do this is during a break between regular Lodge meetings, when brethren may have more time.
- All members of the Lodge should be invited to attend and encouraged to contribute, especially newer members.
- The first time a Lodge embarks on Step 1 it may require a number of meetings to complete the process.
- If any such meeting is held during one of the regular Lodge meetings, it would be better that no visitors are present.
- These meetings should be chaired by a suitably skilled and experienced member; one who cares about the future of the Lodge and is prepared to let all others have their say, even if their suggestions appear radical to others.
- The chairman may ask the Lodge Membership Officer (LMO) to assist in planning the agenda for the meeting or meetings.
- The first step is to prepare a Lodge profile. A Lodge profile describes the Lodge's key features and especially its characteristics, circumstances, expectations and values. It should answer all the questions a person interested in membership might ask.
- When preparing the profile, [review all aspects](#) of the Lodge and consider whether they are still appropriate and whether they will be relevant and attractive to future members.
- As a member's continued involvement largely depends on there being a good match between him and the Lodge, the Lodge's characteristics, circumstances, expectations and values are especially relevant to anybody being considered for membership.

- The Lodge profile is a useful document from which other materials, such as brochures for external use and promotion, can be created.
- It is best to wait until Step 2 before identifying prospective candidates.
- However, if members share an interest (such as a sport, a particular hobby, an old school or place of worship) or the Lodge has a distinctive feature (such as meeting at places or times that are noticeably different from other Lodges), the Lodge profile can refer to seeking more members who share the that interest or who are attracted to that feature.
- The Lodge can then [create a profile of an ideal candidate](#). A candidate profile helps identify prospective candidates and filter or screen anyone who enquires about joining the Lodge, to check they are a good match.
- Equally, diversity in membership is important in any successful group, especially in having people with a range of different personalities, skills and qualities.
- If at any point from here on a member puts forward a prospective candidate for Initiation or joining, or if a man enquires about joining, his circumstances, characteristics and expectations can be compared to the Lodge and/or candidate profile to gauge his suitability for the particular Lodge.
- [Examples of Lodge and candidate profiles](#) are available.
- With completed Lodge and candidate profiles, the Lodge can plan how it will make others in its local community aware of its existence, being mindful of UGLE’s vision for 2020, which is to:

“become openly recognised within our communities as the premier fraternal organisation and the society of choice for individuals with high standards of integrity who are seeking fellowship, personal development, social and charitable involvement that satisfies the needs of themselves and their families.”
- The Lodge profile can be developed into an outward facing leaflet or brochure, intended for non-Freemasons and written in language that they will understand. Take into account guidance on [what we can discuss with non-Freemasons](#) when creating such leaflets.
- The Lodge can promote itself to the local community through [events organised by other organisations](#) and at events organised by the Lodge. The attendance at any such event by the Lodge or its members must be carefully and thoroughly organised in advance.
- During the Lodge planning meetings, the Lodge should be able to identify members to fulfil key roles:
 - If one has not yet been appointed, an enthusiastic and appropriately skilled member, not necessarily a PM, for the role of Lodge Membership Officer (LMO). He may already have a role in the Lodge. In some Lodges it may be appropriate to combine the role of LMO and Lodge Mentor.
 - Members who are willing to meet potential candidates who approach the Lodge with an interest in joining.
 - Members who are skilled and experienced interviewers from whom can be drawn the interview panel. Each interview panel comprises only three members but it may be useful to identify a few members who can sit on panels so that adequate cover is always available.
- The Lodge plan should be documented with clear responsibilities allocated to named members, deadlines defined and review points and dates agreed.
- Lodges that wish to undertake a more in depth review, consider fundamental changes or produce more detailed plans can follow the guidance in [“Creating a Lodge development plan”](#) or ask for assistance from their Provincial Membership Officer, who could facilitate review and planning meetings.
- Once the Lodge has agreed its plan, and its Lodge and candidate profile, it is ready to identify actual people who will be attracted by the Lodge profile and who are likely to be suitable as new members. This process is covered in Step 2 of the Members’ Pathway, [“Identifying prospective Candidates”](#).
- It is possible that during the planning process members may conclude that the Lodge does not have a viable future and is heading for closure. This is a sad but legitimate outcome.

- If matters have not got too far, there are other [alternative futures for Lodges](#), which can be considered as part of the Lodge planning process.
- The priority in all such cases is to involve the Lodge's Metropolitan, Provincial or District Grand Lodge and to ensure that as few members as possible are lost to the Craft. The sooner the inevitable is recognised, the more can be done to retain members.

Note: The techniques described here may equally be used by Royal Arch Chapters.

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