

# **MEMBERSHIP WORKING PARTY SUB-GROUP**

## **Members' Pathway Training for Provinces A self-learning guide for Provincial Officers**

### **INTRODUCTION**

This self-learning guide is intended for all Provincial Officers who have a responsibility for promoting the Members' Pathway and supporting others as they implement it in their Lodges. This includes Provincial Membership Officers, Provincial Grand Mentors and members of their teams, as well as Provincial Grand Secretaries, Provincial Grand Almoners, Provincial Migration Officers and Rulers with executive oversight of membership matters.

The Members' Pathway is fundamental to United Grand Lodge's (UGLE's) vision for the future of the Craft, and in particular for the achievement of its strategic objectives for membership development. The Members' Pathway brings together best practice models from around our constitution into one integrated approach, designed to grow our membership and strengthen the health of our Lodges. It incorporates and encompasses the best approaches to mentoring developed over recent years and adds guidance to help Lodges attract and introduce new members.

After two and a half years of development and testing, the Members' Pathway was endorsed by the Rulers and launched at the Provincial & District Rulers' Forum in October 2017 when it was approved by all Provincial and District Grand Masters and Grand Superintendents.

For ease of reading, throughout this guide we refer to Provinces. However, every reference should be taken to include all Metropolitan, Provincial & District Grand Lodges.

### **USING THIS GUIDE**

This guide has been written to help new Provincial officers learn about their role in connection with the Members' Pathway and plan how they will carry out that role in a timely and efficient manner. As a self-learning guide you can use it to learn at your own pace and in co-operation with your colleagues in your Province.

As well as this self-learning guide for Provincial officers, we have developed three workshops so that you can train members of your Lodges in the practical use of the Members' Pathway. The workshops cover the techniques in (1) Steps 1-6, (2) Steps 7-11 and (3) Interviewing applicants.

This guide is not designed to be completed in one session. At various points through this guide you will be invited to complete a learning activity. These activities will involve some reading, or some research or to work with colleagues. We recommend that you complete this learning guide within two months of your appointment.

Most of this guide is common to all Provincial Officers who will support the Members' Pathway, although there will be variations in the scope of roles between Provinces. If appropriate, please adapt learning activity 4 to suit your specific responsibilities. Towards the end of the guide there are some additional learning activities relevant to specific roles.

These learning activities are designed to help you achieve the following learning outcomes. Please make your own notes when completing the learning activities.

## LEARNING OUTCOMES

By the end of the self-learning guide you will be able to:

1. Explain the Members' Pathway, its rationale, structure and the different roles and responsibilities involved
2. Identify Province-wide needs and issues relating to attracting, introducing and retaining members
3. Assist in the development and delivery of a Provincial membership strategy, incorporating attracting, introducing and retaining members
4. Promote and support the use of the Members' Pathway, its tools and approaches, within the Province
5. Assist Lodges to develop and implement a planned approach to membership and mentoring
6. Identify and share membership development and mentoring good practice around the Province
7. Produce and disseminate local support materials
8. Organise and deliver presentations, training and updates to members of the Province
9. Monitor and review the success of membership strategy and plans
10. Liaise with other Provincial Officers and teams to help deliver the Provincial membership strategy
11. Complete any other Members' Pathway related tasks specific to your role
12. Assist the national initiative with the development of support materials and by sharing and disseminating good practice.

## KEY POINTS

- In the years prior to the development of the Members' Pathway, the number of men joining the Craft had fallen. Of those who did join, 20% resigned before receiving their Grand Lodge Certificates. This resulted in smaller and weaker Lodges.
- UGLE's 2015-2020 strategy set an objective to improve the attraction and retention of members and defined the following measures of success:
  - a. Membership will remain over 200,000
  - b. Resignations before Grand Lodge certificate will have reduced from 20% to less than 10%.
- The purpose of the Members' Pathway is to increase and maintain long-term healthy membership of the Craft. It is concerned with both growth and improving the membership experience.
- It includes guidance on the introduction of the Royal Arch as the final step in "pure Antient Masonry". It recommends that early reference should be made to the Royal Arch, from the point when prospective candidates are considering membership of the Craft.
- It is aimed at and written for the use of Lodges. We anticipate Provinces promoting, supporting and monitoring its use in their Lodges, providing training and sharing best practice.
- The Members' Pathway was designed following *internal* research undertaken by UGLE's Membership Focus Group, and an *external* study that examined why people join and remain active in membership organisations.
- A pilot study undertaken in ten Provinces and 120 participating Lodges between April 2016 and March 2017 demonstrated widespread acceptance of the approach as well as its successful use.
- The Members' Pathway is not prescriptive. Lodges may adopt those elements they need and adapt the tools and techniques to suit their circumstances and the skills of their members.

- Nevertheless, the Members' Pathway is comprehensive and structured. Lodges that follow the 11 Steps will be able to implement a consistent and integrated approach to member development.
- The Members' Pathway is dynamic. It will evolve as new methods and better practices develop. This will ensure it remains relevant and applicable far into the future.
- It is available in different formats and at three levels of detail, as follows:
  - a. As an introductory leaflet. The leaflet was attached to the December 2017 edition of "Freemasonry Today" and posted to all members. It provides an overview of the Members' Pathway, its purpose and structure.
  - a. As a high level explanation of each Step, available as a booklet. The leaflet and this booklet will be especially useful when visiting Lodges or meeting with members to discuss the Members' Pathway.
  - b. As a comprehensive online package in which the "what" of every Step is explained in depth, with "how" they are used explained in detailed tools and techniques available via hyperlinks in Support Documents.
- All the above can be found on the [b.UGLE.org.uk/membership](https://b.ugle.org.uk/membership) web page.
- It should be regarded as reference material, the detail of which is to be consulted as required rather than read from cover to cover.
- The Members' Pathway incorporates Masonic mentoring and integrates it within its structure. Mentoring is no longer a *stand-alone* process. It is an integral and vital component within the Members' Pathway.
- The Membership Working Party (MWP) Sub-Group is the group within UGLE responsible for supporting Provinces as they promote and support the use of the Members' Pathway in their Provinces. Members of the group are available to advise and support you.

### ACCESSING THE MEMBERS' PATHWAY

- The Members' Pathway is available in its different formats online on the bUGLE site, at <https://b.ugle.org.uk/membership>.
- These resources were designed for online access, where hyperlinks can take the reader to further material.
- Individual documents may be printed, but doing so will not provide access to the linked files.
- Copies of the booklet describing each Step at a high level are available from Dean Simmons on [dsimmons@ugle.org.uk](mailto:dsimmons@ugle.org.uk).

### UNDERSTANDING ROLES AND RESPONSIBILITIES

- The Members' Pathway defines a number of roles and responsibilities at both Provincial and Lodge levels.
- Detailed role profiles exist for these roles and may be accessed by clicking the appropriate links from the Introduction to the Members' Pathway.
- How a Provincial Grand Master, and indeed a Lodge Master, allocates these roles and responsibilities to individual members, which offices he appoints them to and how he structures any Provincial team or teams, is entirely a matter of his choice and discretion.
- Neither UGLE nor the Members' Pathway mandate how those roles and responsibilities should be allocated.

- In most cases, two separate people are likely to undertake the roles defined for a Provincial Membership Officer and a Provincial Grand Mentor. In other cases, these roles may be combined or even split across a larger number of people, perhaps with some strategic functions being assigned to a senior member of the Provincial executive.
- In this guide we refer to these officers collectively as the Provincial membership team.

### SEEKING SUPPORT

- As a Provincial officer with a responsibility connected to promoting and supporting the Pathway in your Province, you have access to the MWP Sub-Group and a Facebook group set up to support you and others in your position.
- You can address your comments or questions from above to a member of the MWP Sub-Group or to your peers from other Provinces.
- To contact the MWP Sub-Group, please email Tony Harvey on [aharvey@ugle.org.uk](mailto:aharvey@ugle.org.uk).
- To join the Facebook group, please contact Tony Harvey on [aharvey@ugle.org.uk](mailto:aharvey@ugle.org.uk) and provide the following information:
  1. Your name and Province.
  2. The Provincial role or office you are undertaking in connection with the Pathway.
  3. The email address registered within your Facebook account.
- Tony will add you to the Facebook group and you will receive a confirmation, after which you will be able to post comments and questions and share your ideas and successes.
- Please only use the Facebook group to raise and discuss issues relating to the Members' Pathway.

### LEARNING ACTIVITY 1: UNDERSTANDING THE PATHWAY

Before progressing any further, please read the Members' Pathway Step Guides. They can be found in the section, "Read about the key stages in the Members' Pathway", on the webpage [here](#). Follow the hyperlinks as appropriate, to answer the questions below.

#### Questions

1. What is the rationale for the Members' Pathway?
2. In your own words, how would you explain it to a Lodge member in one short paragraph?
3. In relation to your area of responsibility, what specifically does the Members' Pathway offer to Lodges and what tools and techniques are covered in the Support Documents?
4. What elements would involve new or different approaches for the majority of the Lodges in your Province?
5. What comments and questions would you like resolving before you move forward with the Members' Pathway?

You may address your comments and questions to the MWP Sub-Group or to the Facebook group, as outlined above.

### LEARNING ACTIVITY 2: PROVINCIAL NEEDS AND ISSUES

Next, please consider the following questions in relation to the current circumstances in your Province.

1. Was your Province involved in the pilot of the Members' Pathway pilot? If so, which Lodges were included and what were the results? Can any act as forward-looking *beacon* Lodges to which you can refer, to test new ideas and to evaluate success?
2. What are the current membership trends within your Province? Over the last five years, what has been the average number of new members joining each year? What has been the average number of resignations, cessations and deaths? Do you consider these figures to be *healthy*?
3. Are there any "outlying" Lodges that are doing significantly better or worse than others at attracting, introducing and retaining members?
4. What has the Province previously done to help Lodges attract and introduce new members? Do these approaches fit well with the Members' Pathway? What changes or adaptations will you want to make to these approaches in the light of the Members' Pathway?
5. How mature are your Province's mentoring processes? Is there a Provincial mentoring policy or strategy that defines "how things are done" locally? When was it last reviewed? Does it need updating? How can it be incorporated into a wider membership strategy?
6. What are your Provincial Grand Master's expectations for your area of responsibility? What goals have you agreed with him? What are your priorities and timescales?
7. How well do you know the other Provincial officers involved in membership development? Are you working together on a joined-up plan? Have you agreed who will do what and the boundaries between your roles and responsibilities?

Please discuss your conclusions with your colleagues and agree a collective understanding of the needs, issues and priorities to be addressed in your Provincial membership strategy. Documenting what you agree will help with the development of a membership strategy.

### **A PROVINCIAL MEMBERSHIP STRATEGY**

- A Provincial membership strategy sets out the Province's high-level and long-term approach to achieving UGLE's and the Province's own membership objectives. It will define the overall direction and some of the key principles that will be adopted in more detailed and shorter-term plans and activities.
- The membership strategy should be aligned to and supportive of the wider Provincial strategy defined by the Provincial Grand Master.
- The officers responsible for implementing a strategy would normally work together to develop and agree an approach to meet the Provincial Grand Master's brief and expectations. The strategy should then be agreed with the Provincial Grand Master and his executive before communication to the wider membership.
- We recommend that a membership strategy should encompass both membership acquisition and mentoring and reflect all eleven Steps in the Members' Pathway.
- A membership strategy is likely to cover a period of between three to seven years, depending on needs and issues and other key milestones in the Province.

### **MONITORING AND REVIEWING SUCCESS**

- Measuring the success of your strategy and plans will involve using sources of data that you can poll now and at regular intervals.

- Avoid seeking or gathering too much data or making data collection a complex activity.
- A few good sources that yield data across a number of measures of success will be the most economic and effective approach.
- It is advisable that at least one member of the Provincial membership team should have access to UGLE's membership system, Adelphi, and be able to download data and write reports.

### LEARNING ACTIVITY 3: AGREEING YOUR PROVINCIAL MEMBERSHIP STRATEGY

In this activity, you are asked to work with your Provincial colleagues to develop and agree a Provincial membership strategy.

Once you have agreed the strategy, apply its measures of success to create a baseline. The baseline will define your start point, or "where we are now", against which all future progress can be compared.

If the Province already has a membership strategy, or if you are not expected to be involved in preparing that strategy, arrange instead to discuss that strategy with your colleagues and make any suggestions as to how you think it can be enhanced.

Consider how you, given your role, will be able to contribute to the success of the membership strategy.

The MWP Sub-group is seeking examples of good practice to share with others. We would be especially pleased to receive examples of Provincial membership strategies, which can be forwarded to Tony Harvey at [aharvey@ugle.org.uk](mailto:aharvey@ugle.org.uk).

If you have any questions about developing a strategy, you may ask for assistance from the Membership group via Tony or from the Facebook group.

### INTRODUCING THE MEMBERS' PATHWAY

- Introducing the Members' Pathway to Lodges and brethren is likely to require promotion, persuasion, training, support and the sharing of good practice.
- You may want to differentiate between events and activities that promote the use of the Members' Pathway, others that brief people so that have an understanding of it, some that train people to use its approaches and techniques and others still that facilitate the sharing of good practice.
- Having launched the Members' Pathway, and perhaps trained people in its use, Lodges are far more likely to succeed if you demonstrate interest in what they are doing, offer targeted practical support where required and if you also ask them to share their experiences and successes.

### LEARNING ACTIVITY 4: PROMOTING, SUPPORTING, SHARING

This learning activity is designed to help you plan the introduction of and continued support for the Members' Pathway in your Province. We recommend that you complete this activity in collaboration with other members of the Provincial membership team.

Based upon the Provincial wide needs and issues that you identified in learning activity 2, and the Provincial membership strategy that you agreed in learning activity 3, please consider and complete the following:

1. Discuss with your Provincial Grand Master, or appropriate Ruler, your specific role in promoting the Members' Pathway in the Province, in supporting its use in Lodges and in sharing good practice.
2. How will you, working with others on the Provincial membership team, promote the use of the Members' Pathway in your Province?
3. Have you decided to introduce the Members' Pathway first to some agreed or prioritised Lodges or will you introduce it to all Lodges at the same time?
4. How will you approach and persuade Lodges to use the Members' Pathway?
5. How will you brief brethren about the Members' Pathway, explain its use and respond to questions?
6. How will you encourage Lodges to adopt the planned approaches outlined within the Members' Pathway?
7. What local promotional and support materials will you want to produce?
8. What existing resources and support materials might need updating to reference the Members' Pathway?
9. How will your plan incorporate or link with Royal Arch membership development activities in your Province?
10. How will you offer training in Steps 1-6, 7-11 and interviewing techniques? (Note: full Trainers' Manuals are available for these programmes and will require experienced trainers to run them.)
11. How will you identify, collect and share good practice around the Province?
12. What record systems will you need to create and how will you keep these up to date?

We recommend that you document your answers to the above in the form of an operational plan, complete with goals, resources and timescales.

When creating local support materials, please take into account that the Members' Pathway is a live process and will continue to be updated and developed as experience and good practice grows. Therefore, we recommend that you avoid repeating or rewriting the content of the Members' Pathway for local use. Instead, concentrate on how the Province supports the use of the Member's Pathway and the local support mechanisms on offer, using links to the original materials.

### **HAVE YOU THOUGHT ABOUT ... ?**

In this section we list a number of considerations to factor into your planning:

- What are the age, geographical and other demographic variations across the Province?
- Do you have an early adopter Lodge in every Masonic meeting place?
- Have you considered the skills of members within the Lodges, whether they are well equipped to implement the Pathway or whether they will need additional support or training?
- Do you have any Lodge members who might become "Pathway Ambassadors", willing to advocate the use of the Members' Pathway either formally or informally among their peers in other Lodges?
- How can the Province make use of Lodge profiles produced at Step 1 of the Members' Pathway?
- How can the Province help Lodges promote a positive public image of Freemasonry in their communities?
- Has the Province produced comprehensive and easy to access information about its Lodges, meeting places and charitable activities, aimed at non-members?
- Do Lodges need help creating a Lodge plan?

- How might you assist Lodges that find a prospective candidate who is well suited to Freemasonry but who is not appropriate for their Lodge?
- What processes have you set up to respond to membership enquiries received by the Province, to allocate and refer them to appropriate Lodges?
- Does the Province have a role in helping people refine and develop skills relevant to the Pathway (eg, talking about Freemasonry, interviewing applicants, etc) beyond initial training?

### **LEARNING ACTIVITY 5: ROLE SPECIFIC TASKS**

This learning activity details specific questions or tasks, additional to those above, for Provincial officers who – as well as their other responsibilities – have connections to the Members’ Pathway.

We recommend that, where appropriate, the following be completed in conjunction with relevant members of the Provincial membership team. These tasks may be adapted to suit the allocation of responsibilities within the Province.

#### Provincial Grand Masters, Deputies & Assistants

Please consider:

- How does your overall Provincial strategy impact on the implementation of the Members’ Pathway and what implications does the implementation of the Pathway have for your strategy?
- How do you wish to structure the Provincial membership team, who do you have with the appropriate skills & qualities and who might you be able to develop into future roles?
- How will you measure the success of the Members’ Pathway and the Provincial membership team?
- How will you promote the implementation of the Members’ Pathway and what messages do you want to include in your Provincial communications?
- How will you feedback your progress in relation to the Members’ Pathway, and membership development in general, to UGLE / MWP and how will you recommend issues for improvement or development?

#### Provincial Grand Secretaries & Scribe Es

Please consider:

- What impact does the implementation of the Members’ Pathway have on Provincial processes & procedures and what changes will you make to these?
- Given any changes in processes or procedures, how will you ensure that the requirements of the Book of Constitutions / General Regulations of the Royal Arch and the Provincial By-laws are carried out?
- What administrative support will you offer for the Members’ Pathway and to the Provincial membership team?
- What information and / or reports will you provide to the Provincial executive and UGLE?
- What do you want Lodge Secretaries / Chapter Scribe Es to do to support the use of the Members’ Pathway in their Lodges & Chapters?

#### Provincial Grand Almoners

Please consider:

- What can Lodge Almoners do to support the use of the Members' Pathway in their Lodges?
- In particular:
  - a. How can they work with Lodge and Personal Mentors to support new and existing members?
  - b. What can they do to monitor member attendance, to identify issues that restrict full participation and to recognise early signs of dissatisfaction?
- What can you do to support Lodge Almoners and the Provincial membership team?

#### Provincial Grand Orators, Education and Learning & Development Officers

Please consider:

- What contribution can Masonic learning & development make to the enjoyment and continued membership of new and existing brethren?
- How can you work with the Provincial membership team to enhance the Masonic experience and to offer new opportunities for personal growth and development?
- How will you involve the Provincial membership team in your work, especially in relation to identifying and satisfying local needs for Masonic learning & development?

#### Provincial Migration Officers

Please consider:

- What will you do in your Province to promote continuity of membership?
- How can you work with the University Lodges Scheme to facilitate continuity of membership of students and graduates from scheme Lodges?
- How will you identify the most appropriate Lodges to receive particular brethren moving into the Province, using Lodge & candidate profiles?
- How will you identify the potential of incoming brethren for roles and offices in the Province?
- How will you monitor the continued membership and satisfaction of incoming brethren who join Lodges in the province?

#### Those who manage and conduct exit interviews

Please consider:

- What processes can you put in place to ensure that resignations are reported and followed up promptly, within a defined period?
- How will you identify other appropriate Lodges for dissatisfied brethren to visit and consider joining, using Lodge and candidate profiles?
- How will you monitor, review and report the causes of and patterns in resignations to members of the Provincial membership team?

### **SUPPORTING THE NATIONAL INITIATIVE**

The MWP Sub-Group wishes to keep the Members' Pathway up to date by including the best available and most successful approaches, tools and techniques. It wants to hear from Provincial officers who have successfully implemented the Pathway, as well as any difficulties that may have been experienced.

As and when appropriate new material is received, it will be incorporated into updated versions of the Members' Pathway package on *bUGLE*. Please keep the members of your Province updated with these changes and developments.

At times the group may also seek the involvement of others who can contribute materials, ideas, experiences and their own special skills to ensure this initiative continues to serve the developing needs of the Craft, our Provinces and Lodges.

We will communicate new developments and request for assistance to Provincial Grand Masters and to those with relevant Provincial offices or responsibilities. Please register for the Members' Pathway Facebook group and keep us up to date with changes in local roles and contact details.

### **A PLAN OF ACTION**

Before completing this self-learning guide, please review your notes from the learning activities and create a plan of action, complete with target dates. You may find it useful to prioritise your actions by time or importance and to identify those actions that require the involvement and co-operation of others.

### **AND FINALLY**

We trust that this self-learning guide has been of practical use to you and your colleagues and has met your learning needs.

Please let us know how it has helped you, what difficulties you may have experienced, any learning needs you think it has not addressed and how you think it can be improved. All feedback can be sent to Tony Harvey at [aharvey@ugle.org.uk](mailto:aharvey@ugle.org.uk).

### **THANK YOU**