

The following pages contain a strategy for developing a list of prospects and managing the contact process through to the reunion.

As you and your team review this strategy know that this isn't the only way to approach membership recruitment.

You may choose to use email and Internet resources to facilitate the orientation process.

You may decide to target your contact approach based on the age of the prospects.

Whatever you and your team decide the key thing to remember is that you have to have a membership recruitment plan and someone supervising it or you won't have new members.

In a fraternity such as ours it is incumbent upon every member to be involved in the process of identifying potential new members. Do not assume that because by title or position that one man can do all of the membership work. Whoever is the membership guru in your Valley is responsible for holding the rest of the Valley accountable to the membership recruitment plan and not responsible for single-handedly recruiting the entire class in the next reunion.

MEMBERSHIP STRATEGY OUTLINE

Step:

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How to Build a List of Potential Members And How to Develop a Hot List

By potential member is meant a good man, who could become a good Mason, or Scottish Rite Mason. Other than the need to be first, a Lodge member, in order to become a Scottish Rite Mason, the process for putting together a list of men who could become member of your Scottish Rite Valley or you Lodge is the same. If Lodge membership in your area needs to be built up first, then start there.

Step 2

The first step is to decide if you are going to work on this as an individual, or form a committee or team to work collectively on the project. In most cases a group of men working together will yield better long-term results, but a one-man team can be very effective.

Step 3

Next, get ever one on the committee / team together (even if just one). Define your mission and goals. A typical goal would be for each team member to come up with from eight to ten names. This may sound like a lot, until you think about how many men you actually know. We all have as many as five circles of friends and acquaintances that are from our family, our church, our neighborhood, place of employment, and community contacts.

Distribute copies of the *PROSPECT INFORMATION SHEET* and discuss its proper use. Agree on the minimum number of names, and that a *PROSPECT INFORMATION SHEET* will be filled out for each one. Make sure every one is committed to success. Set the time and place of the next meeting.

Step 4

At the next meeting, review all the names to insure accurate information on the *PROSPECT INFORMATION SHEETS*, and that everyone agrees that these are good men to contact. Then decide how many of these potential members you can handle at one event. To determine a workable number, ask the following questions:

- ◆ What is the capacity of the facility or room that will be used when this information or friendship event is held?
- ◆ How many letters do you want to send?
- ◆ How many excellent phone calls are you willing / able to make?
- ◆ Will this number be within our budget?

Once a realistic number has been agreed upon, choose that many names from the overall pool of names gathered. Note that contacting men in a group who already know each other can have a positive effect. This becomes you **HOT LIST**. Save the other names you have gathered for your next event or for individual contact.

Prospect Information Sheet

*Prospect for: Masonic Lodge or Scottish Rite

*Full name: _____

*Goes by: _____

*Street address: _____

*City / State / Zip: _____

*Primary Telephone (Home – Work- Cell): _____

*Primary Email: _____

Other Telephone (Home – Work- Cell): _____

Other Phone (Home – Work- Cell): _____

Other Email: _____

Age or Date of Birth: _____

Occupation: _____ Where Employed: _____

Hobbies or interests: _____

Church affiliation: _____

* indicates necessary information

Names of other Masons / Scottish Rite Masons who live in his area:

Does he have any relatives or friends who are members of the Masonic Lodge / of the Scottish Rite? Who are they?

Lodge where he is a member OR Lodge in his area that he might be interested in joining?

Please keep this information for invitation use only. Please be discrete.

Reproduce this page as needed for each prospect

Step 5

Valley Letterhead

Sample letter for current Masons to attend a Friend to Friend Night.

Change highlighted text.

Dear Brother <LASTNAME>,

You have been recommended to us for membership in the Ancient Accepted Scottish Rite, Valley of _____.

The thousands of Scottish Rite Masons of city or state location have a long tradition of instilling moral values, building relationships and friendships that last a lifetime, including families in activities, while doing worthwhile charity work in our community and region.

The Scottish Rite Masons of the Valley of city or state location enjoy fellowship with one another, participate in a wide variety of activities and events, and are the proud sponsors of a Masonic Learning Center for Children.

We would like to tell you more about Scottish Rite Freemasonry in general and the Valley of _____, Ancient Accepted Scottish Rite in particular. In order to do this we are holding a Friend To Friend Night and we would like you [and your spouse] to attend.

It will be held at _____ [location]
_____ address
(include any directions that might be helpful)
_____ date & time

We will have a brief explanation of Scottish Rite Freemasonry, presentation of our recent activities, and will be serving refreshments / enjoying a full meal. We look forward to having you as our guest.

If you would like more information ahead of time, or need assistance with transportation that evening, contact (name and phone number / email).

Fraternally Yours,

(hand signed in contrasting ink)

Name

Email and / or Phone Number

Step 5

Valley Letterhead

Sample **personal** letter for current Masons to attend a Friend to Friend Night.
Change highlighted text.

Dear Brother <LASTNAME>,

You have been recommended to me OR I have come to know you as the kind of man whom I would like to recommend -- for membership in the Ancient Accepted Scottish Rite, Valley of _____.

The thousands of Scottish Rite Masons of _____ have a long tradition of instilling moral values, building relationships and friendships that last a lifetime, including families in activities, while doing worthwhile charity work in our community and region.

The Scottish Rite Masons of the Valley of _____ enjoy fellowship with one another, participate in a wide variety of activities and events, and are the proud sponsors of a Masonic Learning Center for Children.

I would like to tell you more about Scottish Rite Freemasonry in general and the Valley of _____, Ancient Accepted Scottish Rite in particular. In order to do this I am hosting a Friend To Friend Night and I would like you [and your spouse] to attend.

It will be held at _____ [location]
_____ address
(include any directions that might be helpful)
_____ date & time

I will have a brief video explanation of Scottish Rite Freemasonry, presentation of our recent activities, and will be serving refreshments / enjoying a full meal. I look forward to having you as my guest.

If you would like more information ahead of time, or need assistance with transportation that evening, please call me (phone number / email).

Fraternally Yours,

(hand signed in contrasting ink)

Name
Email and / or Phone Number

Step 5

Valley Letterhead

Sample **personal** letter for current Masons to set up an individual appointment.

Change highlighted text.

Dear Brother <LASTNAME>,

You have been recommended to me OR I have come to know you as the kind of man whom I would like to recommend -- for membership in the Ancient Accepted Scottish Rite, Valley of _____.

The thousands of Scottish Rite Masons of _____ have a long tradition of instilling moral values, building relationships and friendships that last a lifetime, including families in activities, while doing worthwhile charity work in our community and region.

The Scottish Rite Masons of the Valley of _____ enjoy fellowship with one another, participate in a wide variety of activities and events, and are the proud sponsors of a Masonic Learning Center for Children.

I would like to tell you more about Scottish Rite Freemasonry in general and the Valley of _____ Ancient Accepted Scottish Rite in particular. In order to do this I would like to invite you to come to my house at a time convenient to you or I would be glad to come to your place. Your spouse is welcome to sit in if she would like. I'll give you a call to see which works best for you.

I will have a brief video explanation of Scottish Rite Freemasonry, presentation of our recent activities, and will answer any questions that you may have. I look forward to having you as my guest or sharing with you at your place

If you would like more information right away, please call me (phone number / email).

Fraternally Yours,

(hand signed in contrasting ink)

Name

Email and / or Phone Number

Step 5

**Blue Lodge or
Personal Letterhead**

Sample **personal** letter for Non- Masons to attend a friendship night.
Modify and use if permissible in your Grand Lodge jurisdiction.
Change highlighted text.

Dear **XXX**,

You have been recommended to us OR **I have come to know you** as the kind of man whom I would like to recommend -- for membership in the Masonic Fraternity.

Masonry is an organization for men and is the oldest, largest and we believe the greatest fraternity in the world. There are thousands of Masonic Lodges around the world, more than **xxx** right here in **_____**. One of these lodges is **(name & number of lodge)** located in **(city)**.

Our lodges are completely organized and run by our members. We have year round activities for members and their families.

We would like to tell you more about Masonry in general and **(name & number of lodge)** in particular. In order to do this we are holding a friendship night and we would like you and your spouse to attend.

It will be held at **_____** [location]
_____ address
(include any directions that might be helpful)
_____ date & time

We will have a brief explanation of Masonry, presentation of our recent activities, and will be serving **refreshments / enjoying a full meal**. We look forward to having you as our guest.

If you would like more information ahead of time, or need a ride that evening, call **(name and phone number / email)**.

Fraternally Yours,

(hand signed in contrasting ink)

Name
Email and / or Phone Number

Step 6

THE FIRST PHONE CALL

Use this outline to follow up on any of the letters that were sent to prospects.

1. OPENING

- a. Ask for prospect by name.
- b. Introduce yourself and say that you are from _____ Masonic Lodge or the Valley of _____ of Scottish Rite.
- c. Did you get our / my letter?
- d. Get permission to continue (Is this a good time to talk?)
- e. Make clear your purpose
 - Tell him that the " <event name>" is in _____ days and that you hope to see him there! OR
 - Tell him that you would like to get together sometime soon so that you could tell him more about Masonry / the Scottish Rite.
 - Give name(s) of others involved from his area that he might know.
- f. Deal with resistance
 - If at this point he says he can't make it, you should tell him: "I sure hope you can", "that there will be other) guys there from his area". "Do you know _____ or _____, both of them are planning to be there."
 - Tell him: "I would really like the chance to tell you more about the Masonic Lodge / the Scottish Rite." "We can find a time that would be convenient for you."
 - In either case, emphasize no obligation for listening.
 - Develop as much trust as possible

2. DATA GATHERING (if necessary) **Use the Prospect Information Sheet**

3. NEGOTIATING THE CONTRACT

- a. Date, time, and place (directions, if needed)
- b. Length of program / visit
- c. Transportation (for a gathering away from prospect's home)
 - "Would you like a ride?"

- “It will be no problem for one of the guys to swing by your house and pick you up.”
- "We can pick you up at about _____a.m./p.m. Is that Okay?"

4. CLOSING

- Restate contract (Date, time, and place)
 - Tell him what to wear (if not at prospect's home)
 - Such as, “This is a real informal affair; just wear jeans.” Or business casual or shirt and tie.
- Closing remarks
 - Thank him for deciding to come . . .
 - or tell him you will call him back to see if he can make it after all.
 - Thank him for making time available for your visit . . .
 - or tell him you will call him back to see if he will have time sometime later.

5. IF THE PROSPECT IS NOT HOME AT THE TIME OF YOUR PHONE CALL, YOU SHOULD DO THE FOLLOWING:

1. Introduce yourself
2. Say why you are calling.
3. Tell them that you will call back at a later time. Is there a time that might be best to call?

**DO NOT LEAVE A MESSAGE FOR THE PROSPECT TO CALL YOU BACK!
NO ONE WANTS TO CALL STRANGERS ON THE TELEPHONE.**

Step 7**THE SECOND PHONE CALL** (the night or several nights before)

If he was one of the people who said that they were unsure or did not want to come or to have you visit, try again, using some of the elements of the first call outline. (Unless, of course, he already had plans that he told you about earlier or was adamant that wasn't interested.)

1. The prospect may be a little nervous, considering the event or visit is the next night / day.

Call him by his first name. Say, "Hi _____."

2. Identify yourself.

3. Tell him you are JUST CALLING AS A REMINDER ABOUT <TOMORROW NIGHT>.
(day, time, and place)

4. Tell him - who will be picking him up, or ask if he needs directions;
- who will be coming with you and check on your directions if necessary.

5. Tell him again that what the dress for the event is.

6. Tell him again about the guys that will be there from his area (or other group he knows).

7. Get the commitment. It's up to you, the caller.

Material in this outline is a blending of resources from the DeMolay Membership Planning Guide & Idea Book and LEAD Consultants, Inc.: Lab I

Step 8

Guidelines for Gatherings and Contacts with Prospects

What could it look like? Perhaps “what SHOULD it look like?” is the next question to be considered. The answer to that question can be found in a realistic view of the circumstances of your Masonic group, your role in the group, what need it has for growth, or your personal interest in recruitment.

Consider what we are working with:

- Is this one Lodge or group of Lodges that are located in the same building or area?
- Is this a district, a county association, Scottish Rite Club, or a Valley?
- Are you in a position of leading others or are you a member that wants to see some growth in your Masonic organization? In any case, if you are willing to follow the steps and do the work of contacting and hosting a gathering of some sort, positive results can be achieved.

The following are some possibilities of the types of ‘face to face gathering’ that you could consider:

- One man asking one other man for a half hour to see a video and hear a few words about Scottish Rite Masonry or about the Masonic Lodge at your home or at his home. (If you host the gathering yourself, be sure your place is presentable and conducive to discussion. You may choose to serve light refreshments to your guest(s).
- One man asking three or four men to come and see a video and hear a few words about Scottish Rite masonry or about the Masonic Lodge. This could be at your place or possibly at the Masonic Lodge itself.
- One man (or group of men) might agree to chair an event with other men volunteering to help. The event could be a dinner, a lunch, a breakfast, or just a good snack.
- An open house as a part of a community celebration can also be done.

Hosting a Friend to Friend Night, A Masonic or Scottish Rite Information Night, or an Open House event is a way of showing potential members a taste of the good things that make our fraternity what it is.

When done using the step by step process outlined in this packet, it should stimulate a desire to become a member in the men who attend.

- ◆ Be prepared!
- ◆ Show a brief and interesting video about your group.
- ◆ Be ready to share stories of what Masonry or Scottish Rite Masonry has meant to you.
- ◆ Have petitions / applications for membership on hand.
- ◆ Extend the invitation to become a member (this is selective invitation, not solicitation).
- ◆ Be prepared to follow up.

Whichever format you choose, it should be well planned and executed. You and / or your team should appear informed, and sound enthused.

Step 8



SHARING MASONRY / SCOTTISH RITE
Telling the story in 10 minutes or less



Introduction (include a hint of your personal story)

A. A SHORT story about the Masonic Lodge / Scottish Rite as an organization:

B. A SHORT story about my lodge / valley:

C. My story about Masonry / the Scottish Rite:

Invitation:

Step 9**Follow Up Contact**

So the people that you wrote letters to and called came to the event you invited them to and you're feeling pretty good about everything, so what's next?

1. Assuming that the prospect completed a petition at your event your follow up procedure becomes one of hosting the candidate and insuring that he makes it to the reunion and that his experience is tremendous.
 - a. You'll again want to ask if he want to ride to the reunion with you
 - b. You'll want to remind of the date, time, what to wear, and where to park.
 - c. You should also make sure that his spouse's questions are answered and that she is invited to attend any programs that are available by another spouse.
2. What if your prospect didn't complete the petition at the event?
 - a. You'll need to contact your prospect within 48 hours after the event and ask him if he's thought about everything he saw and if or his spouse has any questions.
 - b. Ask him when it would be convenient to meet for lunch/coffee/breakfast/golf and review his petition.
 - i. If he suggests a date and time congratulate him for his interest in joining the fraternity and schedule the appointment.
 - ii. If he says that he's not interested in following through on joining ask him what about the fraternity didn't appeal to him.
 1. If he has misperceptions use this as an opportunity to share the correct information.
 2. If his reasons are time and work related remind him that he can be involved as he wants to, but that the lessons he will learn in the degrees can be life-changing and that many men make time to improve themselves through Masonry as they do going to the gym.
3. If after due diligence the prospect is not able to make the decision to join today ask him if it would be ok to keep him on your calendar and call on him again after a few weeks to see if his schedule has changed or he has had a chance to think about it some more.
 - a. If he was a strong enough prospect for you to contact him in the first place you should be willing to invest some time in getting to know him outside of Masonry and over time your Masonic example may change his mind.

Step 10**Prepare Candidates for Initiation**

So you've followed up with your candidate and he knows what to wear, when you'll pick him up, and when things will wrap up, so what else does he need to know?

As with any organization Masonry has a vernacular all its own and a set of traditions that may seem foreign to a new comer, so a few minutes of coaching will keep some of these new ideas from being distractions during the reunion or degree presentation. This could even be started in the car on the way to the event.

Things to consider for orienting your candidates:

1. Take them on a tour of the Lodge or Temple showing them points of historical interest and of necessity.
2. Introduce them to the Secretary and office staff that they'll be talking to when they call with a question.
3. In a group setting show the candidates the latest Scottish Rite Charities videos to help them see specifics about the Rite's involvement in these organizations.
4. If possible, have a parent from a Learning Center come and talk to candidates about what the experience has been for them and their child.
5. Introduce your candidate to your other Scottish Rite friends.
6. Sit in on the orientation conducted in a group setting with all candidates and answer any questions that your candidates may have afterwards.

MEMBERSHIP STRATEGY - RESOURCE LIST

DVD RESOURCES:

YOUR INVITATION TO EXPLORE THE ANCIENT ACCEPTED SCOTTISH RITE

DVD & Packet for newly raised Master Masons,
Available from the Supreme Council AASR
P O Box 519, Lexington MA 02420 (800) 814-1432

32° MASONS – THE MONUMENT BUILDERS

DVD with Notebook available through your Valley secretary or Membership Chairman

BROCHURES:

A MATTER OF DEGREE: How to become a 32nd Degree Mason

Available from the Supreme Council
P O Box 519, Lexington MA 02420 (800) 814-1432

FRIEND TO FRIEND: From Centuries Past Through Centuries to Come

Available from the Masonic Renewal Committee of North America
P O Box 87
Harbert MI 49115-0087 (888) 734-4232
www.masonic-renewal.org

WHO ARE THE MASONS? AND WHAT DO THEY DO?

Available from the Masonic Information Center
8120 Fenton Street, Silver Spring MD 20910-4785
www.msana.com
#BK-130 50 for \$13.50 + shipping

VIDEO TAPES:

SCOTTISH RITE FREEMASONRY: A Conscience for America

Available from the Supreme Council AASR
P O Box 519, Lexington MA 02420 (800) 814-1432

BOOKS:

IT IS TRUE WHAT THEY SAY ABOUT FREEMASONRY?

Available from the Masonic Information Center
8120 Fenton Street, Silver Spring MD 20910-4785
www.msana.com
#BK-510 \$7.50 plus shipping

Recruitment Accountability Steps

1. Measurement of petitions
 - a. Increase or decrease over last year
2. Candidates who attend the reunion
 - a. % of candidates who attend reunion and become members

Notes: