



Thematic
Goal

Redefine our relationships with our members and prospects

Defining
Objectives

Recruitment

Acquisition of
new members

Assimilation or
Incorporation

Orientation and
intentional process
of bonding

Enrichment

Interest and
need driven
programming

Reclamation

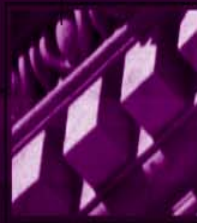
Reconnecting
with at-risk and
recently
suspended
members

Standard
Operating
Objectives

Revenues

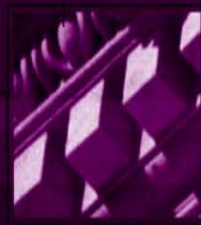
Expenses

Charities
Development



Assimilation

Orientation & An Intentional Process of Bonding



Understanding How Members Bond

- **Shared Beliefs and Ideas**
- **Personal friends and acquaintances**
- **Involvement in small groups**



Mentors

- **A personal guide for a candidate through the degrees**
- **Someone to answer questions**
- **An acquaintance to encourage and facilitate participation**
- **“a year and a week” option**



New Member Bonding

- **Within 60 day (30 is better)**
- **Designated valley member meets face to face**
- **Casual 'get to know each other'**
- **Complete new member information & interest sheets**



Recent Member Contact

- **Two weeks before reunion**
- **Invitational & informational**
- **Mention necessary items**
 - **Dues card, reservations, what to wear .**
- **Be ready to share upcoming dates and information about activities**



Activity Interest Survey

- **Use only if utilized**
- **Contact follow up on referrals**
- **Invitations to full involvement**
- **Add items and modify format to meet your needs and situation**



**First line
signer**

Survey

Follow Up

Mentor

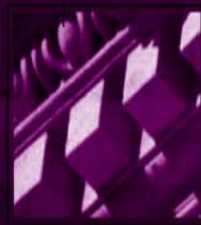
New Member

Recent Member

New Member

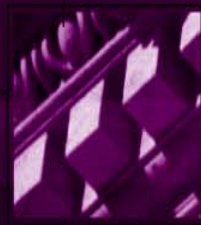
Contact

Contact



Enrichment

Interest & Need Driven Programming





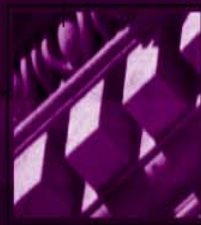
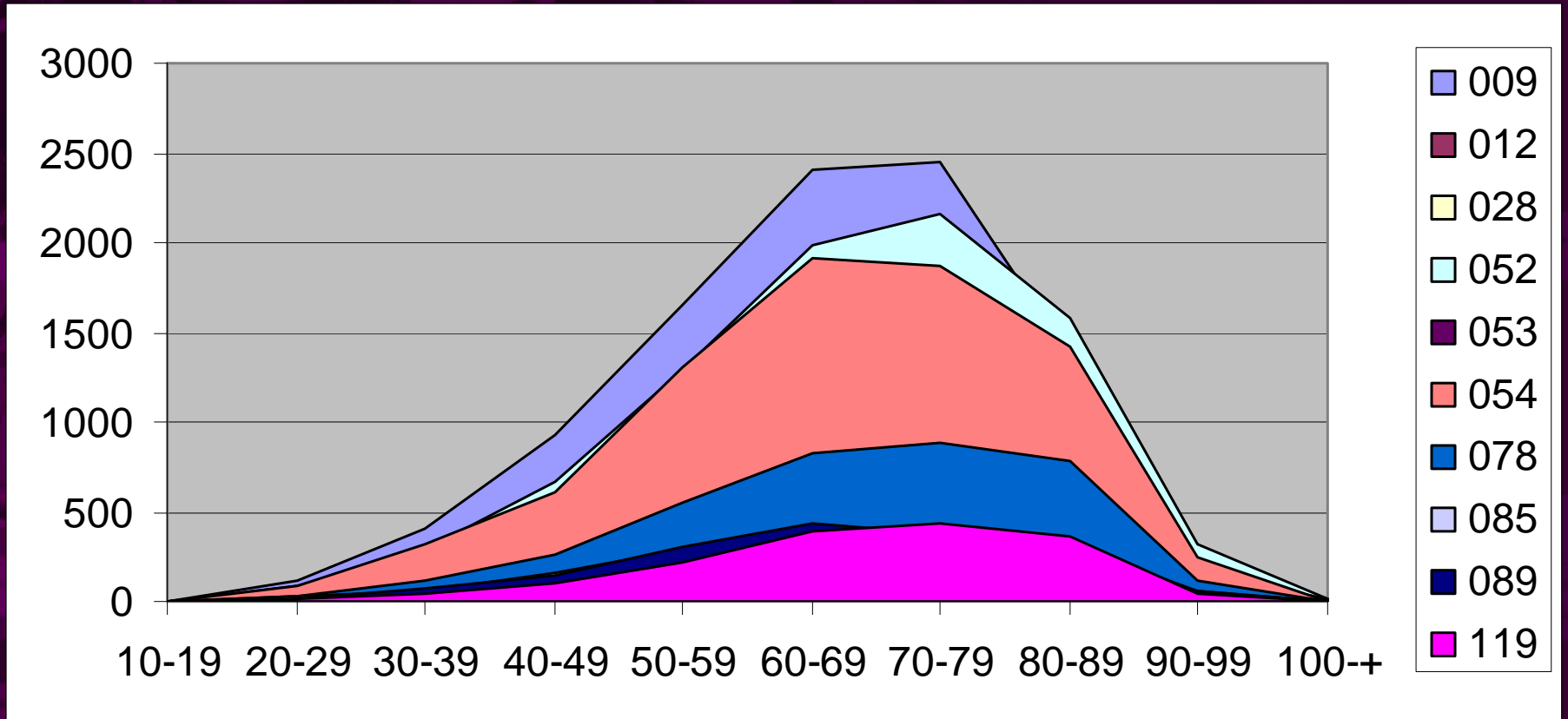
DORIC LODGE
AND
P.A.M.

Enrichment

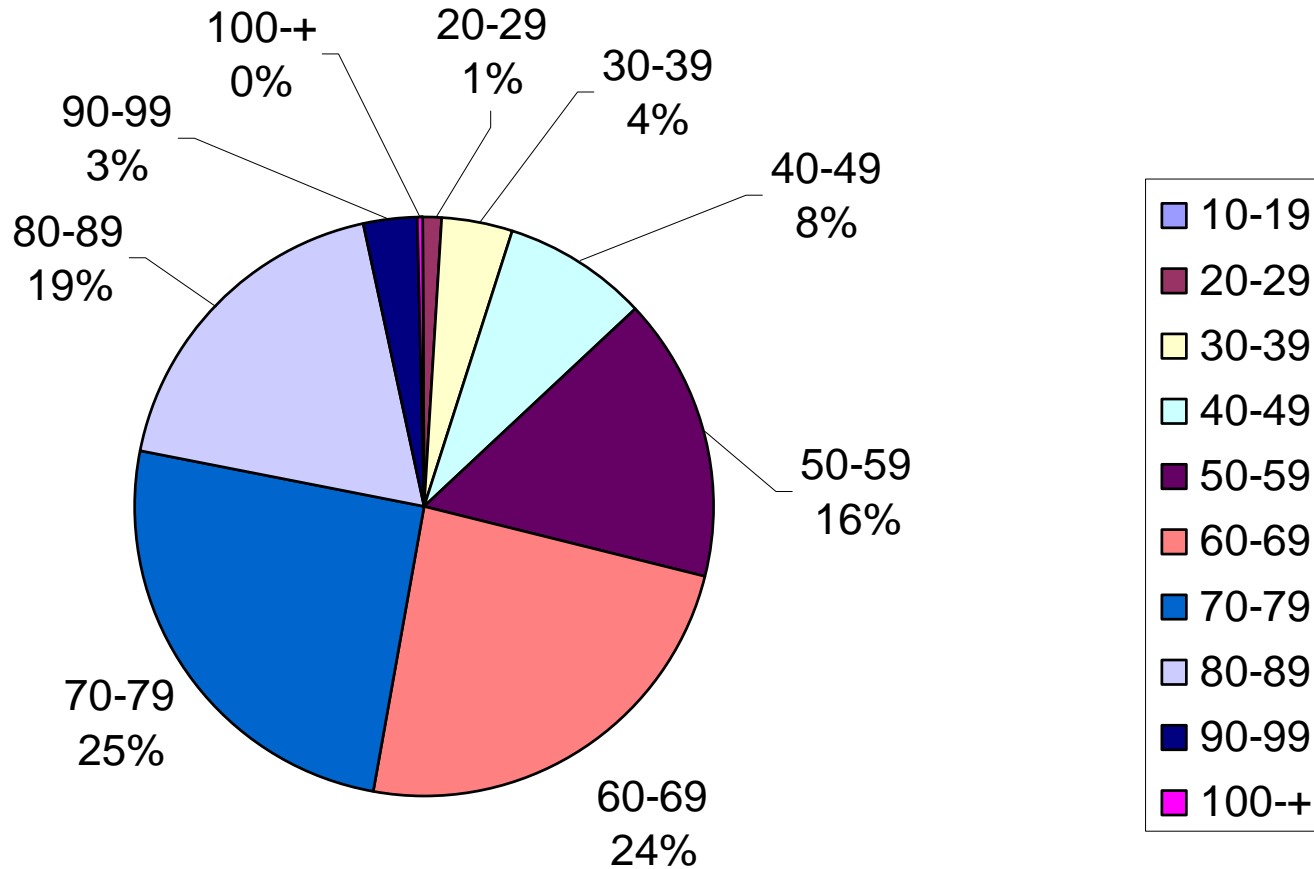
Interest & Need Driven Programming



Why do we need to do this now?



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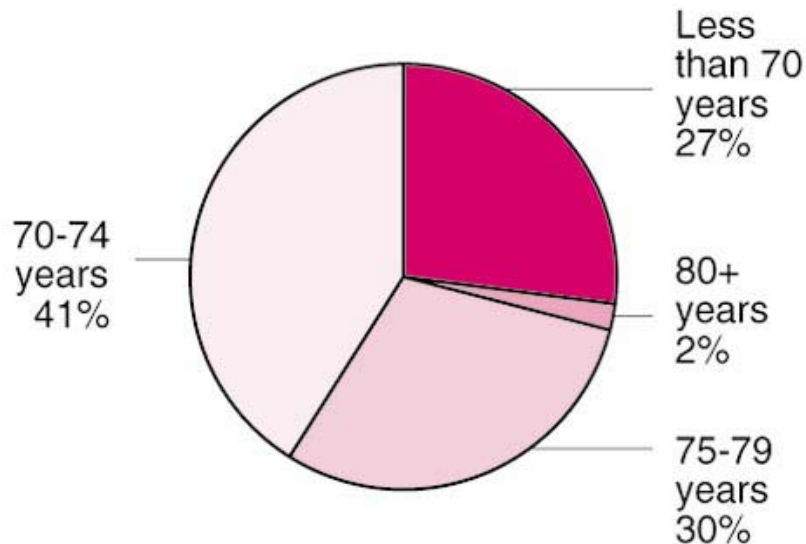
Why do we need to do this now?

Global Distribution of Life Expectancy at Birth: 1998

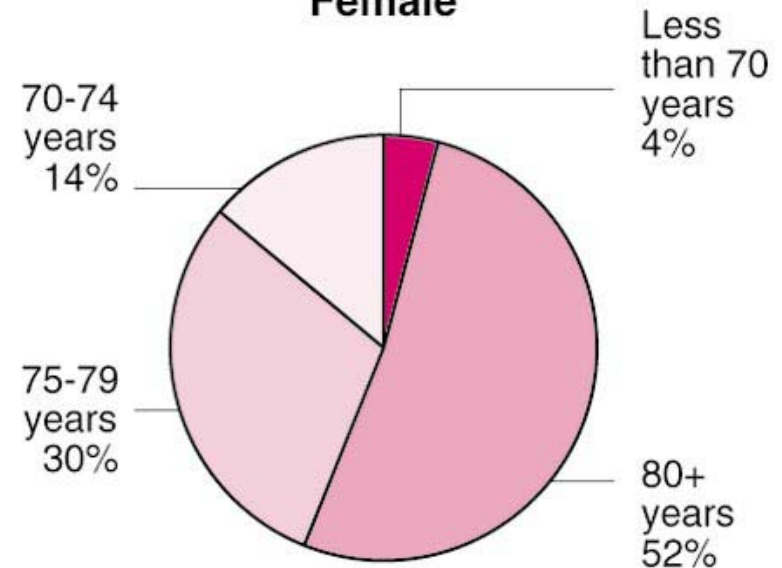
(Percent of countries in each category)

Developed Countries

Male



Female



DEVELOPED COUNTRIES

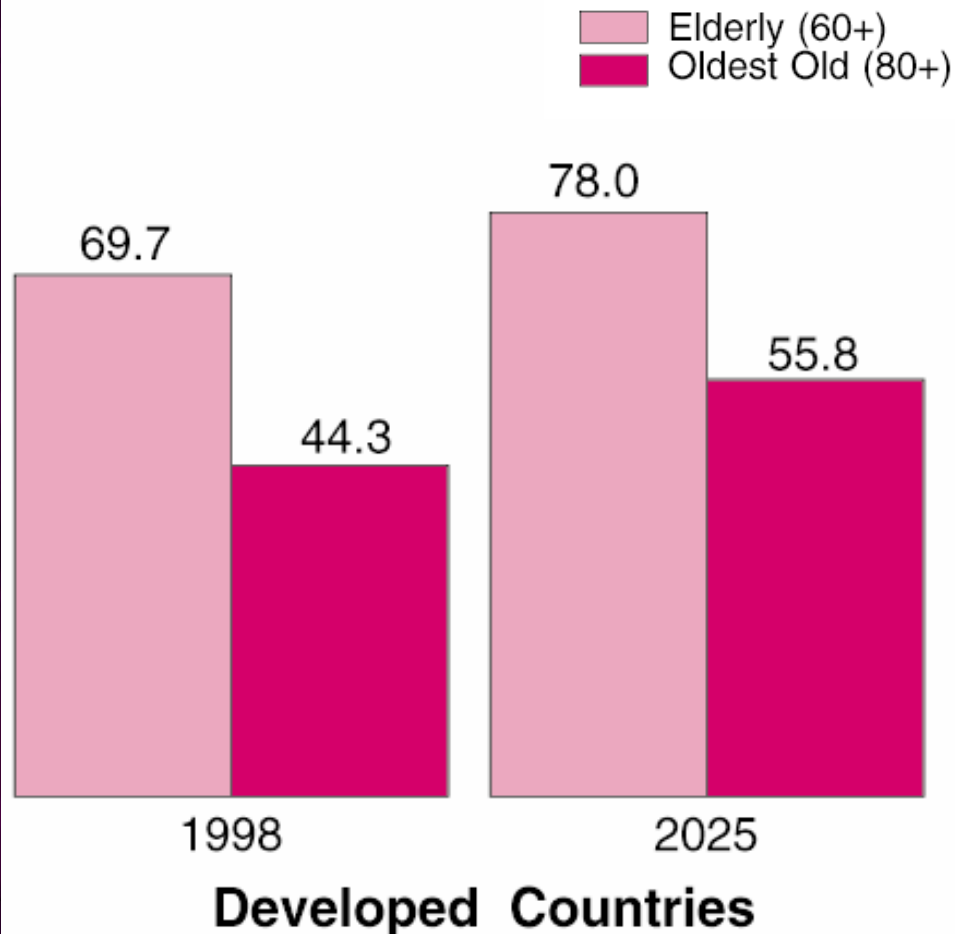
Region/country	Circa 1900		Circa 1950		1998	
	Male	Female	Male	Female	Male	Female
Western Europe						
Austria	37.8	39.9	62.0	67.0	74.1	80.7
Belgium	45.4	48.9	62.1	67.4	74.1	80.7
Denmark	51.6	54.8	68.9	71.5	73.6	79.1
France	45.3	48.7	63.7	69.4	74.6	82.6
Germany	43.8	46.6	64.6	68.5	73.8	80.3
Norway	52.3	55.8	70.3	73.8	75.4	81.2
Sweden	52.8	55.3	69.9	72.6	76.5	82.0
United Kingdom	46.4	50.1	66.2	71.1	74.8	80.1
Southern and Eastern Europe						
Czech Republic	38.9	41.7	60.9	65.5	70.8	77.7
Greece	38.1	39.7	63.4	66.7	75.8	81.0
Hungary	36.6	38.2	59.3	63.4	66.5	75.4
Italy	42.9	43.2	63.7	67.2	75.3	81.7
Spain	33.9	35.7	59.8	64.3	73.8	81.6
Other						
Australia	53.2	56.8	66.7	71.8	77.0	83.0
Japan	42.8	44.3	59.6	63.1	76.9	83.3
United States	48.3	51.1	66.0	71.7	72.9	79.6

Why do we need to do this now?

- **Our widows will have the last say over contributions to our charities.**
- **Shouldn't we prepare now?**

Sex Ratios for the Elderly and Oldest Old: 1998 and 2025

(Men per 100 women)



Where do we begin?

Process Checklist

1. **Accept Responsibility And Embrace Change**
2. **Assemble Your Team**
3. **Get To Know Your Audience**
4. **Event Review**
5. **Event Tweaking**
6. **Event Retirement**



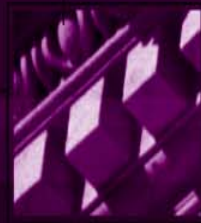
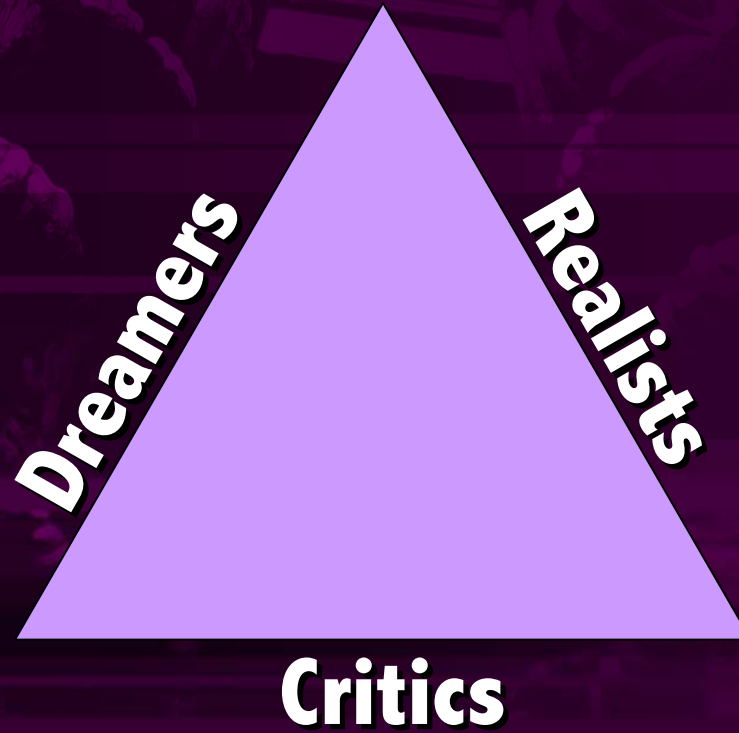
Where do we begin?

Process Checklist

7. Planning For The Big One
8. No or Low Cost Events
9. Customer Service in Day to Day Operations
10. Data Entry and Maintenance
11. Planning for Widows and Orphans, Even Before They Are



Assembling Your Team



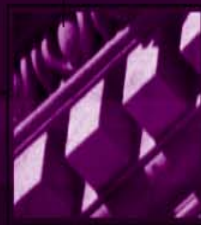
Assembling Your Team

- **DREAMERS**
 - Are oriented to the **FUTURE**
 - Ask the question **WHAT?**
 - Have a tendency to 'chunk up' (expand to the big picture).



Assembling Your Team

- **REALISTS**
 - Are oriented to **NOW**.
 - Ask the question **HOW?**
 - Have a tendency to 'chunk down' to process.



Assembling Your Team

- **CRITICS**
 - Are oriented to the PAST.
 - Ask the question WHY?
 - Have a tendency to 'chunk down' to detail and question it.



Know Your Audience

It's all about...

Good Men Families
Communities
One Nation



Scottish Rite Life



Know Your Audience

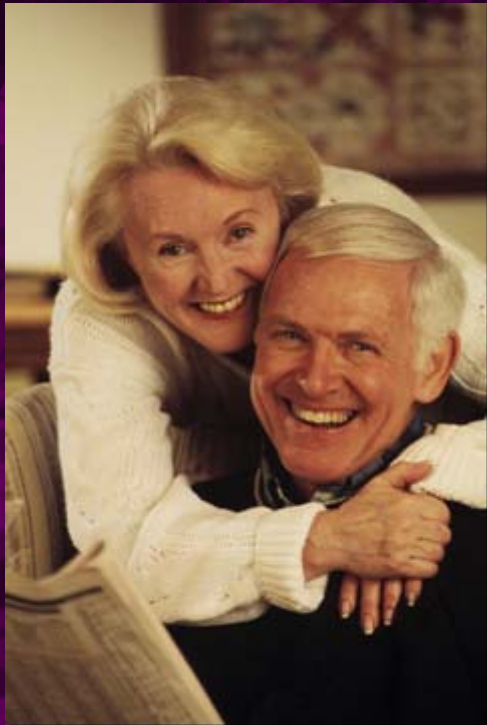
We Communicate Differently

Have Different Goals

Different Needs

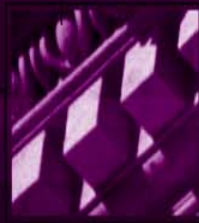
And

That's Alright!



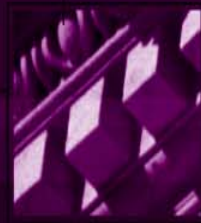
Customer Service

- **Who are our customers?**
 - **Prospects**
 - **Members**
 - **Member Families**
 - **Learning Center Families**
 - **Donors**



Customer Service

- **Test the system**
 - **Modify the system as needed**
- **RE-test the system**
 - **Modify the system as needed**



Data Entry & Maintenance

- **No excuse to not enter all available data on new candidates**
- **We are a membership organization and therefore the data we have for each member is our lifeblood.**



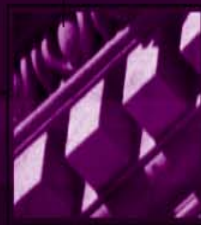
Data is our Friend!

- **It tells us who is having a birthday this month**
- **It tells us who is having an anniversary**
- **It tells us who has served in different positions in the organization**
- **It helps us connect members to other members**



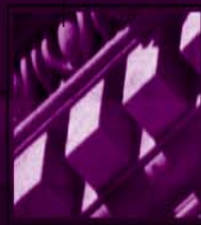
Data is our Friend.

- **Only if we are intentional about gathering it and using it!**
- **Only if we are vigilant in managing and maintaining it!**



A sad statement...

“We don’t enter phone numbers in MDS, because they change too often.”- Valley Secretary, PA



Lunch Work

- Complete the Activity Interest Survey

Scottish Rite Life: Appendix F

ACTIVITY INTEREST SURVEY

Complete the following. Your responses will be used to help develop the program of activities throughout the year, so it is very important that you provide complete responses.

Name: _____ Age: _____

Best means of communicating with me is: (Please provide number or address below)

Phone _____ Email _____ US Mail _____

Date: _____

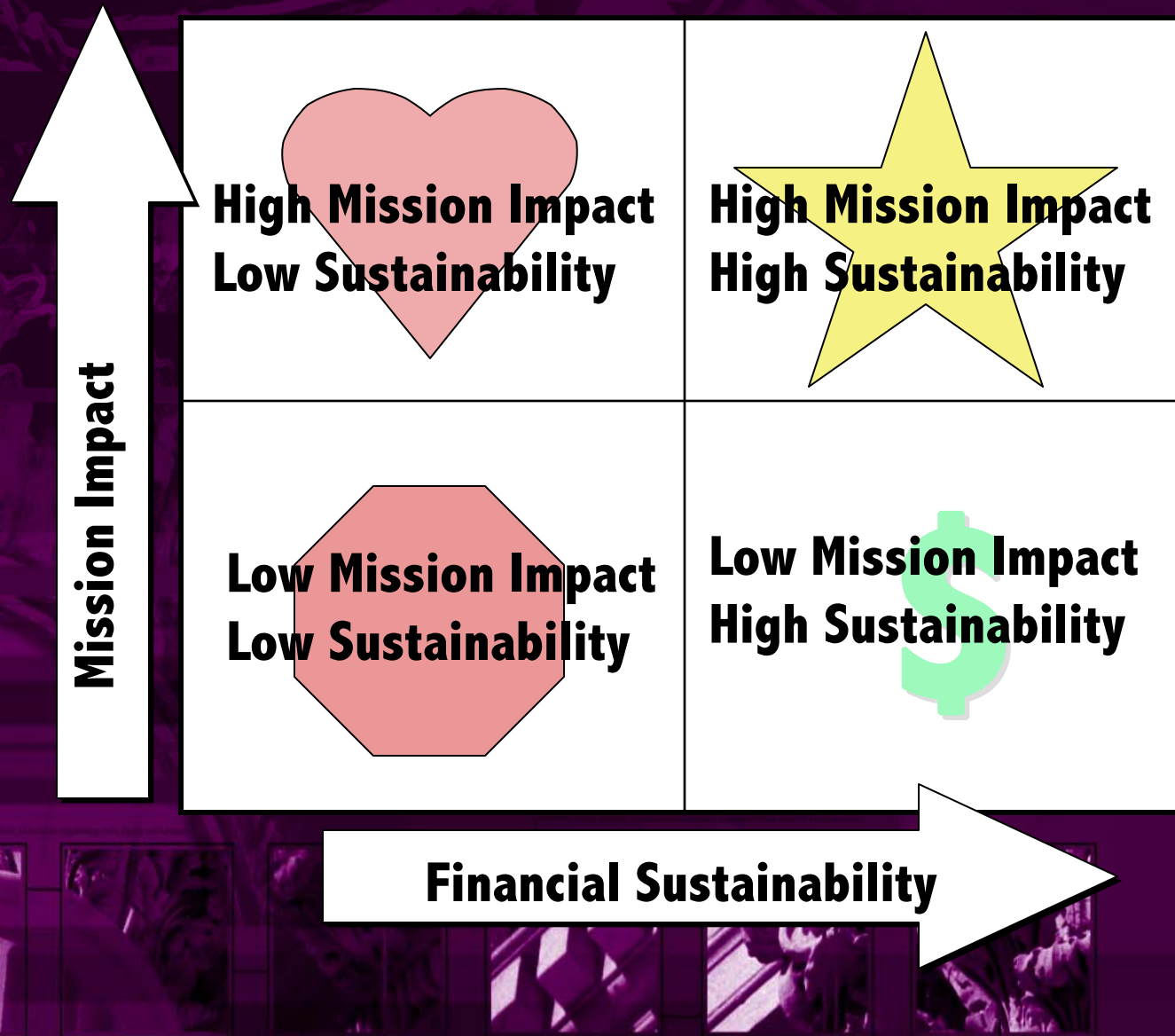
1. What specific interests do you have that you would like to see our Valley pursue during the year?

2. Do you have any ideas or suggestions for activities that would address these interests?

3. Consider for a moment these six experience areas (citizenship, service, leadership development, social, ritual, and fitness). How would your interests fit into any of these areas?



Event Review

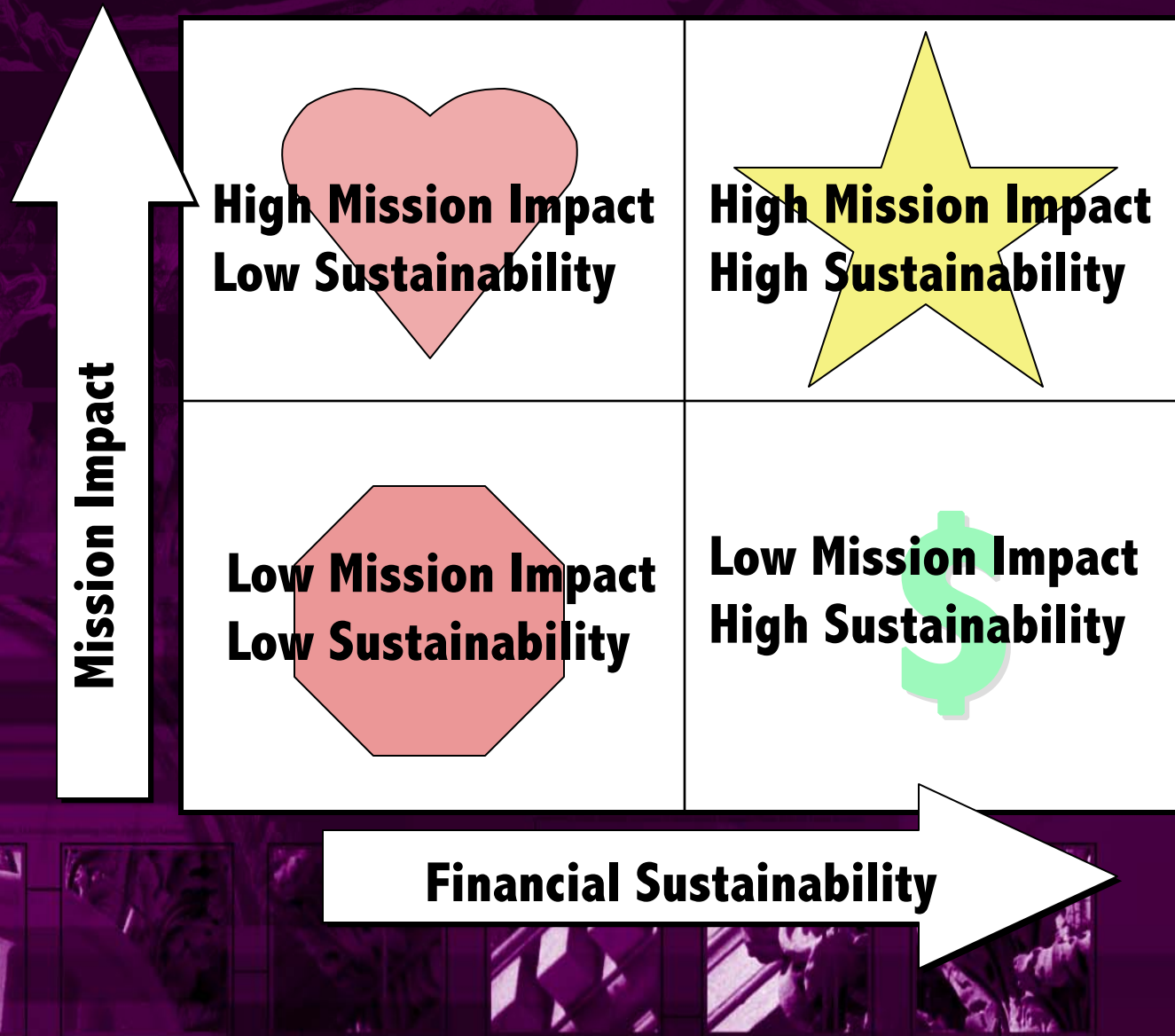


Dead Leader Running

- **Dr. Wayne Cordeiro is Senior Pastor of New Hope Christian Fellowship O'ahu, Hawaii.**
- **New Hope began on September 10, 1995 and is one of the fastest growing churches in the nation.**
- **Over the last 12 years the church has grown to over 12,000 weekend attendees.**



Event Review



Reclamation

Reconnecting with at-risk and recently
suspended members

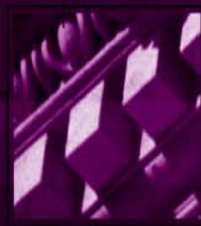


***The right person
making
the right contact***

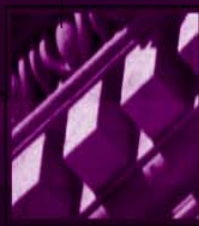


Two versions of the conversation

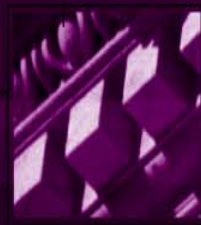
- **A = member who is about to allow their membership to lapse**
- **B = one who has allowed their membership to lapse 'recently'**



LISTEN !!!

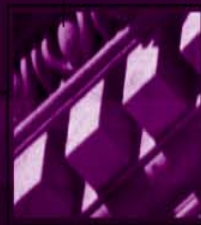


Walk through . . .



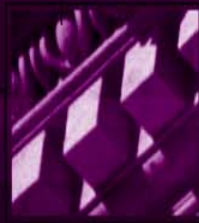
Membership Recruitment Module

*Reaching Out
for a Positive Response*



Membership Recruitment Strategy

- **Invitational (Friend to Friend)**
- **Builds Relationships**
- **Built on Sharing Stories
(not a sales pitch)**
- **Materials ready to be adapted for easy
use**



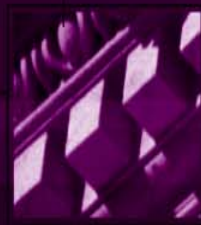
Commitment to the Program, Step by Step

- **Utilize a proven strategy**
- **A Recipe for Success**
- **Follow the plan**
- **Make adaptations to the plan once you have been successful**
- **Edit as needed and appropriate**



Gathering Names and Basic Information

- **An individual effort or team effort**
- **Set a goal**
- **Build List of Names**
- **Use *Prospect Information Sheet***



Gathering List of Other Members from His Area

- **People that he may already know**
- **AND think well of**
- **Someone he might talk to**
- **For use in phone call and other discussions**



Creating a 'HOT LIST'

- Pared down list for current focus
- What is the magic number???
 - Facility
 - Letters
 - Phone Calls !!!
 - Budget
- Based on optimum performance



Mailing Prospects' Letters

- **A friendly, invitational letter**
- **Invitation to see a video and hear some information**
- **Does NOT seek membership decision, but 'Opens the Door'**
- **Letter formats**



Making the First Phone Call

- **Essential part of the process**
- **Needs to be done well**
- **Utilize the outline but do NOT read from it**
- **Practice, practice, practice**
- **Keep it invitational in tone**



Making the Follow-up Phone Call

- **Within an appropriate window of time (3, 5, 7)**
- **Set prospect at ease**
- **Answer questions**
- **Clarify arrangements**
- **Reinforce the commitment**



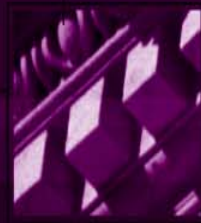
The Gathering or Contact

- **Individual, small or large group**
- **Welcoming atmosphere**
- **VERY well planned and executed**
- **Brief**
- **Story based (with video) (sharing)**
- **Make the invitation !!**



Follow-up Contacts

- **Avoid 'buyer's remorse'**
- **Answer questions**
- **Finalize or facilitate petition**
- **Facilitate fees**
- **Confirm and reinforce his interest and your interest in him**



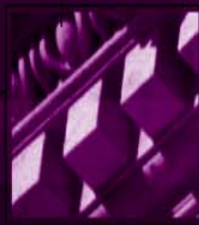
Prepare Candidates for Initiation

- **See that he has all the information he needs**
 - **Schedule**
 - **Location**
 - **What he needs to know . . .**
- **Refer him to information and sites**



**It is NOT about
getting new members
to balance the budget.**

**It IS about offering good men
the further Masonic experience
through the Scottish Rite**



www.ohioscottishrite.com

www.Kemerley.com

