
Membership Development

Executive Summary

Introduction

The continuation of Scottish Rite depends on continued membership growth and development efforts. Membership provides continued support for the many programs we sponsor. Membership is our primary resource and is what builds and maintains our group. A comprehensive membership development plan must incorporate well-developed strategies for retention and recruitment.

Assessing our valley

Surveys including the valley reunions, but also expanded into a broader concern to identify current needs and expectations will be done. The results of the survey will be used to formulate additional strategies for membership development. An attempt to correlate the valley membership rolls with the Grand Lodge rolls will be undertaken to identify potential new members. This project may take considerable time, as it has been indicated that the Supreme Council is very particular on what their data is used for.

Retention

Involving members in the operation of the valley is a critical retention tool. Appoint members to committees, involve them in projects, and consider them for future valley leadership positions. Identifying service of the membership to the valley is critical in retention. The current program of identifying a monthly MVP by the Commander-In-Chief and the identification of past-presiding officers should be continued. In addition to the existing programs, programs to identify years of service, line officer of the year, and others should be implemented.

Programming

An expansion of the valley program committee to include members from each of the 'generation' segments of our valley should also be considered to be sure that programs appeal to all the strata of our valley. We also need to look at engaging more of our past-presiding officers. Programs should also be considered that will provide useful life skills to members. Hold a dinner meeting in the warmer months at the camping area with an outdoor degree.

New Member Education/Induction Orientation

In order for new members to smoothly assimilate into our valley, it is important they become connected to the other valley members and the valley's activities. In order to provide the warm welcome essential for all new members, a new member should be paired with an experienced member. This one-on-one approach can provide new members with a sense of support without categorizing them as part of a particular new member group or "class." This mentor should be a member already attending Rite events and participating in the valley activities.

Continuing Education for Existing Members

Members will feel more a part of the valley if they are kept abreast of changes and events. Use of our valley web site, monthly meetings, e-mails, and valley newsletters to share information will be critical elements. An effort to keep the valley web site up-to-date and also retain some historical archive of events will allow members to see what they are getting for their annual dues.

Incomplete Work

A concerted effort to contact all candidates who have petitioned but not complete their work will be undertaken. At a minimum letter contact and a phone call should be made with each unfinished candidate until the work is completed, or other disposition.

Recruitment

Rite Recruiter & Rite Ambassadors

Each lodge in the valley should have a designated Ambassador assigned. The Ambassadors should be responsible for communicating to lodges within the valley of upcoming events, and communicating our successes. Ambassadors would be also responsible for providing to lodge members information about the benefits of membership in the Scottish Rite, as well as to the lodges themselves. They would have a primary responsibility of recruiting new members, or identifying them to the committee as potential members for a fraternal dinner or other event. Lodge Ambassadors should also pass any lodge events information to the committee for inclusion on the valley calendar and within the valley newsletter.

Public Relations

Public awareness is essential. Making people aware of who our valley is and what our valley does has an impact on membership and encourages community participation in and support for our service projects. Arrange for membership displays in all local lodges. The valley newsletter should be sent to all lodges in the valley.

Working with the Media

Use the media to promote valley activities. Each time Masonry is mentioned in the news, thousands of people are reached. More than just enhancing Masonry's image, public relations can help gain support for projects, attract members, and improve the quality of service that we provide. In order to take full advantage of the media, news must be presented properly and should be done through an appointed valley public relations chairman with a news programming strategy. This should emphasize any and all work with or by youth.

Participate in public events

Be involved in community events such as local parades, county fairs and any other events where a large number of the public (Masonic or otherwise) will be gathered.

Membership Development

Full Program

Introduction

Imagine if we were to lose 10 percent of our members. How would that affect our service program? What projects might not get finished? Which ones might never have been started? Now consider what we accomplish with 10 percent or 5 percent or even 2 percent more members. Think about the new ideas and new service projects that could be initiated. Think about the additional people to take on leadership and committee roles. Every new Mason brings a range of personal and professional resources and knowledge that can greatly strengthen our ability to serve throughout the community.

The continuation of Scottish Rite depends on continued membership growth and development efforts. Membership provides continued support for the many programs we sponsor. Membership is our primary resource and is what builds and maintains our group.

What comprises membership growth and development?

A comprehensive membership development plan must incorporate well-developed strategies for:

- Retention
- Recruitment

Each element is essential to overall membership efforts and needs to be emphasized.

The committee is charged with improving membership in valley. This needs to fold into the two elements above. However, as it relates to recruitment, the committee needs to be a facilitator for new petitions, not the sole source nor primary function of the committee or its members. The realization of petitions should be a by-product of the committee activities.

Assessing our valley

Regular assessment is essential to maintaining effective and successful valley operations. The 2003-2004 budget included an assessment for the current state of the valley. These include the valley reunions, but also expand into a broader concern:

Fall and Spring Reunion Surveys

Purpose: To assess quality of each reunion

Survey: All attendees (n = 100+)

Timetable: Fall Reunion: Nov mailing; analysis and report by mid-January

Spring Reunion: March mailing; analysis and report in April

Responsibility: Jim Grimm

Blue Lodge Survey 1

Purpose: To identify strengths, weaknesses, threats, and opportunities of Lodges in the Valley of Bloomington via an unstructured survey instrument

Survey: Worshipful Master, Senior and Junior Wardens, and Secretary of each Lodge (approximately 230 survey instruments)

Timetable: August mailing; analysis and report in October

Responsibility: Jim Grimm

Blue Lodge Survey 2

Purpose: To rank importance of types of assistance that Valley could provide to Lodges

Survey: Worshipful Master, Senior and Junior Wardens, and Secretary of each Lodge (approximately 230 survey instruments)

Timetable: October mailing; analysis and report in December

Responsibility: Jim Grimm

Blue Lodge Survey 3

Purpose: To evaluate perception of Valley programs to assist Lodges

Survey: Worshipful Master, Senior and Junior Wardens, and Secretary of each Lodge (approximately 230 survey instruments)

Timetable: April mailing; analysis and report in June

Responsibility: Jim Grimm

Survey of Members

Purpose: To determine expectations of members to assist in strategic planning for Valley of Bloomington

Survey: All members residing in Illinois

Timetable: September mailing; analysis and report by mid-November

Responsibility: Jim Grimm

Survey of Members in Arrears and Recent Suspensions

Purpose: To determine why members are in arrears (financial, value received, other)

Survey: Recent drops, suspensions, and members in arrears

Timetable: February mailing; analysis and report in mid-April

Responsibility: Jim Grimm

Considerations for Surveys may include:

- How informative and lively are our monthly meetings?
- How relevant and effective are our service projects to the community?
- Is the community aware of our valley and its accomplishments?
- How connected are our members to the valley and to one another?
- Do our members have adequate opportunities to get to know one another?
- Are our members aware of their responsibilities to the valley?
- How active are our members on service projects, committees, and valley operations?
- How informed are our members of Valley work in the community?

- How effectively and frequently do we communicate to our valley members?
- Are we aware of why members are leaving the valley?
- Do our members make efforts to include new members in all activities?
- Are our members communicating the efforts of our valley to their friends and business associates?
- Are our members open to bringing in new members?
- How effectively do we communicate our valley's programs and projects to members?
- If you were a prospective member, would you be interested in joining our valley?
- What programs should the valley be considering that we are presently not doing?
- What would it take for a member to come to an event, what are they looking for?

The results of the survey will be used to formulate additional strategies for membership development. Each survey should result in actionable items for implementation by the committee.

In order to assess how many members may be available for recruitment an attempt to correlate the valley membership rolls with the Grand Lodge rolls will be undertaken. In an effort to arm valley recruiters with potential member lists of non-Scottish Rite Masons the valley membership rolls will be compared with the Grand Lodge rolls for our area. This project may take considerable time, as it has been indicated that the Supreme Council is very particular on what their data is used for.

Retention

Retaining good members is as critical to long-term success and health as the induction of new members. Retaining current members while building your membership through recruiting is more productive and cost effective than continually replacing members lost to attrition. Additionally, our recruitment efforts will be more effective if the valley has a large number of experienced members in its ranks.

Because members who are committed to and involved in the valley are more likely to maintain their membership, involving members in the operation of the valley is a successful retention tool — and one that should be used as soon as a member is inducted. Appoint new members to committees, involve them in projects, and consider them for future valley leadership positions. Previously overlooked members who have not had an opportunity to serve need to be identified also, they may need more encouragement to get involved. Special attention should be given to members who have been members for less than three years.

Additionally identifying service of the membership to the valley is critical in retention. The current program of identifying a monthly MVP by the Commander-In-Chief and the

identification of past-presiding officers should be continued. In addition to the existing programs, the following programs should be added:

- Line Officer of the Year
- Membership Pins 5-, 10-, 15-year awards
- Member Achievement Award for Non-Masonic Activity
- Identification of committee members with a ribbon or pin.
- Recognition of Blue Lodge Masters in meetings
- Pack the Lodge Night – Pick a lodge to attend and coordinate for the membership to attend that lodge meeting along with the officers of each line. The lodge picked could be one already involved with the valley as indicated in the sign-in log in public relations, or a lodge that is presently not involved with the hope of recruiting new members.

Programming

Involved members, who are participating in the activities offered by the valley, are going to be more prone to staying involved. It is critical that we offer a “smorgasbord” of programming options for members. Involving more members in selecting and coordinating future activities needs to be a priority. An expansion of the valley program committee to include members from each of the ‘generation’ segments of our valley should also be considered to be sure that programs appeal to all the strata of our valley.

We also need to look at engaging more of our past-presiding officers. Using their talents for small programming projects or activities will keep them engaged in the valley and make the best use of their experience. Although some will likely decline to get involved further, these members have demonstrated a commitment to the valley in the past, and are a good source of reliable assistance.

Programs should also be considered that will provide useful life skills to members. Programs or even classes on ‘how-to’ are very desirable to many of our members. Programs such as: How to use a computer, home improvement etc.

Putting together meetings with a degree presentation should also be considered. Given the current building use limitation on our regular monthly meeting nights, it may have to be held on a special night. It could also be held as a dinner meeting in the warmer months at the camping area with an outdoor degree.

New Member Education/Induction Orientation

Educating potential members about the basics of valley membership provides them with realistic expectations about the benefits and obligations of membership.

Our valley needs to make a presentation to new members to inform them of the structure and history of the valley, as well as the valley’s activities. In general, a presentation for new members should cover the following subjects:

- The mission of the valley
 - Valley projects — past and present
 - Valley structure and current officers
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- Financial obligations and responsibilities that come with membership
- Valley programs, with information on how members can get involved
- Benefits of membership
- Opportunities for service
- Ask new members, especially younger ones, to find two or three other members from among their peer group to join.

In order for new members to smoothly assimilate into our valley, it is important they become connected to the other valley members and the valley's activities. In order to provide the warm welcome essential for all new members, a new member should be paired with an experienced member. This one-on-one approach can provide new members with a sense of support without categorizing them as part of a particular new member group or "class." This mentor should be a member already attending Rite events and participating in the valley activities.

In all of this, the involvement of the new member's sponsor is also important. The sponsor needs to keep close contact with the new member for at least the first six months, until the new member is truly involved in the valley.

Continuing Education for Existing Members

- Frequent communication of valley news and information
- A set number of valley programs focused on continuing education, per year
- Personal involvement in valley projects and activities, particularly those that require hands-on action
- Stimulating and efficiently run monthly meetings
- Attendance at meetings of other valleys

Members will feel more a part of the valley if they are kept abreast of changes and events. Use of our valley web site, monthly meetings, e-mails, and valley newsletters to share information will be critical elements. An effort to keep the valley web site up-to-date and also retain some historical archive of events will allow members to see what they are getting for their annual dues.

Incomplete Work

A concerted effort to contact all candidates who have petitioned but not complete their work will be undertaken. At a minimum letter contact and a phone call should be made with each unfinished candidate until the work is completed, or other disposition. Priority will be placed for top line signers to make the contact, followed by members of the committee.

Quietly Out the Back Door

Presently we do make an effort to contact 'at-risk' members when they are in jeopardy of being suspended or request a demit. However, this effort needs to be expanded to include personal contact from the member's top line signer, who should know the member better than other members of the valley. This personal touch to retention of these 'at-risk'

members will hopefully yield better retention, but minimally will provide useful information on why members leave.

Officer Retreat/Planning Meeting

Officer involvement in each line is critical to ensuring that we have well prepared leadership, before an officer becomes a presiding officer. Officer planning or retreat meetings should be held soon after installation to train them with critical leadership skills and to communicate officer expectations. These meetings should also be used to coordinate the valley calendar and line programs.

Recruitment

Rite Recruiter & Rite Ambassadors

Each lodge in the valley should have a designated Ambassador assigned. The Rite Recruiter will first identify an Area Ambassador for each of the assigned areas (see figure below). Each Area Ambassador will then identify a Rite Ambassador in each lodge within their area.

The Ambassadors should be responsible for communicating to lodges within the valley of upcoming events, and communicating our successes. Ambassadors would be also responsible for providing to lodge members information about the benefits of membership in the Scottish Rite, as well as to the lodges themselves. They would have a primary responsibility of recruiting new members, or identifying them to the committee as potential members for a fraternal dinner or other event. They should also notify Area Ambassadors, who will notify the committee of upcoming Blue Lightning or related events.

Lodge Ambassadors should also pass any lodge events information to the committee for inclusion on the valley calendar and within the valley newsletter. Area Ambassadors should be encouraged to write an article for the newsletter summarizing activities in their respective area, and any upcoming events they wish to be publicized.



The Rite Recruiter, who will manage the Area Ambassadors, will handle the Bloomington-Normal area, all others by the Area Ambassadors. The lodges within them as illustrated in the table below will define the areas. Area Ambassadors may request specific lodges to be placed into their area with the approval of the Rite Recruiter, whether in the table or not. Area Ambassadors may feel free to identify other Area Ambassadors within their area to assist with lodges, Grand Lodge District Deputies being a good source of information within an area.

<u>Bloomington-Normal Area</u>	
E 6	Bloomington #43
E 6	Danvers # 742
E 6	Normal #673
E 6	Wade Barney #512

<u>Central Area</u>	
E 6	Comet # 641
E 6	El Paso #246
E 7	Gibson #733
E 6	Heyworth #251
E 6	Le Roy #221

<u>Southern Area</u>	
E 13	Argenta #871
E 10	Atlanta #165
E 14	Bement #365
E 13	Cerro Gordo #600
E 7	De Land #812
E 10	DeWitt #84
E 7	Farmer City #710
E 7	Fraternal #58
E 10	Henderson #820
E 10	Lincoln #210

E 7	Mahomet #220
E 7	Melvin #811
E 11	Paxton #416
E 7	Sangamon #801

Northern Area	
N 15	Acacia-A.M. Dalzell #67
N 16	Leland #558
N 16	Marseilles #417
N 15	Mendota #294
N 16	Meridian #183
N 16	Occidental #40
N 15	St. John's #13
N 16	Streator #607
N 17	Wenona #344

Eastern Area	
N 18	Braidwood #704
N 18	Cedar #124
E 5	Chatsworth #539
E 4	Chebance #429
N 18	Gardner #573
E 4	Kankakee #389
N 18	Livingston #371
N 18	Mazon #826
N 15	Pontiac #294
N 17	Rob Morris #247
E 4	St. Anne #1092
N 18	Tarlbolton #351
N 18	Wilmington #208

Recruitment Ideas

- Have five members join together with the goal of recruiting one new member.
- Make it a point of honor to sponsor a new member.
 - Recognize the sponsor in the valley newsletter and at the monthly meeting.
 - Put a red dot on the badge of every member who has proposed a new member in the current year, or present a special badge to such a member that reads "I Shared Scottish Rite."
- Have the valley commander-in-chief ask three or more members, as a personal favor, to propose one new member each. After one of these three proposes a member, have the commander-in-chief make the same request of another valley member, so that the valley always has three members working on a personal pledge to find a new member.
- Ask each member to submit three names to the valley committee.
- At a valley meeting, have the commander-in-chief or membership chair distribute three-by-five-inch index cards to each member and ask everyone to list five possible candidates on the card. Have valley members submit their lists to the membership chair.
- Remind valley members to tell prospective members about successful valley projects.
- Offer the Grand Elect Mason Degree (14th Degree) at all Valley Blue Lightning events or Grand Master Festivals.
- Offer degree work at monthly meetings in addition to regular business activities.
- Sponsor a fraternal relations dinner for the Scottish Rite. Initially the prospective list will rely on identification by the Ambassadors, but will rely heavily on the membership index mentioned elsewhere.
- Utilize 'Get Up and Go' events as recruitment events.
- Hold a fraternal dinner at the Scottish Rite Rec Area as a cookout.

Public Relations

Public awareness is essential. Making people aware of who our valley is and what our valley does has an impact on membership and encourages community participation in and support for our service projects.

Promoting our valley

Arrange for valley displays in all local lodges. These displays could involve information from all the coordinate bodies of Masonry, each with a petition for prospective members. Since we would be responsible for this project, Scottish Rite Masonry would be the center of this promotion. Getting a Mason to join any coordinate body is in the best interest of Masonry, even if it is not Scottish Rite Masonry.

The committee should also be responsible for communicating to lodges within the valley through the Ambassadors of upcoming events, and communicating our successes. Ambassadors would be also responsible for providing to lodge members information about the benefits of membership in the Scottish Rite, as well as to the lodges themselves.

The valley newsletter should be sent to all lodges in the valley, even if it is not read in the meeting as a communication, it will be available in every lodge for anyone. At the least, it might cause a Mason to ask about Scottish Rite, allowing a member or the Ambassador to pursue their petition. Additionally when members sign-in at the monthly meetings they should be asked to identify their blue-lodge affiliation. The participation totals from each lodge would then be published in each monthly newsletter thanking the top participating lodge for their support of the valley.

Working with the Media

Use the media to promote valley activities. Each time Masonry is mentioned in the news, thousands of people are reached. More than just enhancing Masonry's image, public relations can help gain support for projects, attract members, and improve the quality of service that we provide. In order to take full advantage of the media, news must be presented properly.

Appoint valley and district public relations chairs

Attracting media attention requires hard work and research. A significant advantage is gained by appointing valley PR chairs that work in the communications field and understand the media in your area.

Approach the media strategically

Link your story to a larger trend or current news events. When presenting a story idea to the media, make sure it is brief and to the point. Think of how to best present it in a 30-second sound bite. Tailor your idea to a specific journalist, publication or broadcast program, such as an international news program or a health segment on a local news channel.

Offer knowledgeable spokespeople

When suggesting a story to the media, make sure you can offer articulate local spokespeople who are actively involved and able to inform others.

Identify newsworthy story angles

Every story must have significant news value. The best public relations is effective service. How we address real needs in the community is the kind of story that interests journalists. It helps to support your story idea with background materials, such as fact sheets or brochures.

Ask the beneficiaries of service to speak on behalf of the valley

No testimony is more powerful than that of a family, person or organization who has benefited from Masonry's work. For example, at a press conference to announce the presentation of scholarships ask the student to speak instead of a Mason. Most television viewers and newspaper readers will be more moved by such personal testimony.

Promote work with and for young people

The media is often interested in programs relating to young people and have a particular interest in projects carried out by or for young people. Promoting this work to the media is also a good way of updating Masonry's image.

Participate in public events

Be involved in community events such as local parades, county fairs and any other events where a large number of the public (Masonic or otherwise) will be gathered.

Membership Development Committee

John Dorner, Chairman

Charles Ross, Jr., Rite Recruiter

Dick Miller

Jay Keeran

Bill Tanner

Jim Grimm

Actionable Items (in date order)

Item	Assigned	Target	Completed
Monthly MVP Program	Mike Fowler	Ongoing	Ongoing
Past-Presiding Officer Recognition in monthly meetings	Mike Fowler	Ongoing	Ongoing
Fall Reunion Survey Results	Jim Grimm	05-Jan	
Survey of Members Mailing	Jim Grimm	05-Jan	
Pack the Lodge Night – Winter	John Dorner	05-Jan	
Survey of Arrears and Suspensions Mailed	Jim Grimm	04-Feb	
Recognition of Blue Lodge Masters in monthly meetings	Mike Fowler	04-Feb	Ongoing
Appointment of 4 Area Ambassadors	Charles Ross	04-Feb	
Offer the Grand Elect Mason Degree (14th Degree) at all Valley Blue Lightning events or Grand Master Festivals	Jim Grimm	04-Feb	Ongoing
Blue Lodge Survey 1 Mailing	Jim Grimm	04-Mar	
Begin C in C program of asking members as a personal favor to propose one member each.	Mike Fowler	04-Mar	Ongoing
Ask each member to submit three names to the valley committee	John Dorner	04-Mar	
Begin sending valley newsletter to all valley lodges	Ron Blue	04-Mar	
Member sign-in with blue lodge affiliation	Dave Young	04-Mar	
Survey of Members Results	Jim Grimm	05-Mar	
Personal contact with each member eligible for suspension by their top line signer	John Dorner/ Various	04-Apr	
Appointment of Lodge Ambassadors	Area Ambassadors/ Charles Ross	04-Apr	
Spring Reunion Survey Mailing	Jim Grimm	04-May	
Blue Lodge Survey 1 Results	Jim Grimm	04-May	
Survey of Arrears and Suspensions Results	Jim Grimm	04-May	
Appointment of Spring Candidates to committees	Committees	04-May	
Identification of the Line Officer of the Year	Board of Trustees	04-May	
Identification of committee members with a ribbon or pin	John Dorner	04-May	
Expansion of the Planning committee with a ‘generational’ strata of members	Ron Blue	04-May	
Engagement of Past-Presiding officers in	Ron Blue	04-May	

valley projects or activities			
Mentor program for new members – Spring	John Dorner	04-May	
Retention of calendar events as an archive	John Dorner	04-May	Ongoing
Contact all candidates who have petitioned but not complete their work.	Charles Ross	04-May	
Recognize top line signers of petitions in the valley newsletter	John Dorner/ Ron Blue	04-May	
Recognition of top line signers of petitions during reunions	John Dorner	04-May	
Spring Reunion Survey Mailing	Jim Grimm	05-May	
Pack the Lodge Night – Spring	John Dorner	05-May	
Degree presentation at monthly meeting	John Dorner/ Lars LaBounty	05-May	
Mentor program for new members – Spring	John Dorner	05-May	
Spring Reunion Survey Results	Jim Grimm	04-Jun	
Appoint valley PR chair	Mike Fowler	04-Jun	
Spring Reunion Survey Results	Jim Grimm	05-Jun	
Blue Lodge Survey 2 Mailing	Jim Grimm	04-Aug	
Valley Membership Roll Correlation	John Dorner	04-Aug	
Blue Lodge Survey 2 Results	Jim Grimm	04-Sep	
Pack the Lodge Night – Fall	John Dorner	04-Sep	
Addition of ‘life-skills’ programs	Ron Blue	04-Sep	
Officer Retreat/Planning Meeting	Mike Fowler	04-Sep	
Hold a fraternal dinner	John Dorner	04-Sep	
Blue Lodge Survey 3 Mailing	Jim Grimm	04-Oct	
Attendance at another valley monthly meeting	John Dorner	04-Oct	
Fraternal recruitment display in all valley lodges	John Dorner	04-Oct	
Fall Reunion Survey Mailing	Jim Grimm	04-Nov	
Appointment of Fall Candidates to committees	Committees	04-Nov	
Membership Pins for 5-, 10-, and 15 years	John Dorner	04-Nov	
Membership Achievement Award for Non-Masonic Activity	John Dorner	04-Nov	
Mentor program for new members – Fall	John Dorner	04-Nov	
Blue Lodge Survey 3 Results	Jim Grimm	04-Dec	