

SECTION 8: FORMS AND TOOLS

8.1 PURPOSE

The following section provides a series of tools that can be utilized in working with the lodge to solicit and collect feedback from its members. The usage of the material is described within the appropriate sections of the Tool Kit.

The tools are intended to be used a guidelines. They may be utilized as is, or modified to meet the needs of the specific lodge.

If you have developed tools that work well in your lodge, please pass them along to us so they can be integrated into this Tool Kit for everyone to benefit from.

FORM A1: MEMBERSHIP OPINION SURVEY

The Worshipful Master has directed me to seek your personal opinion on the following issues.

Would you please indicate your choice by answering the following questions. Feel free to write on the back of the page if you need more room.

Q1	<p>Is our meeting date unsuitable, if yes what is suitable? How about the day of the week?, number of times per month?</p> <p>How about our Installation and Visitation date?</p>	
Q2	<p>If you were Worshipful Master what would you do differently?</p>	
Q3	<p>How many social events should be held each year (excluding Installation and Official Visitations)?</p>	<p>0 1 2 3 4 5</p>
Q4	<p>What Social Events would you be interested in attending?</p> <p>Please label your choices by number with the number 1 being having the highest interest. Make as many choices as you feel appropriate.</p>	<p>Bowling Night Ladies Night A Trip to the Casino Golf Tournament Attend a Baseball or Football Game Bingo Night Boat Cruise A Day at the Races A Night at the Theatre Family Picnic</p> <p>Other: _____</p>
Q5	<p>Do you attend lodge on a regular basis? Please mark yes or no. If no please state why?</p>	

The survey results will be used to determine the direction of our lodge for the future. Any direction would be put into a motion at a future meeting, discussed, and voted on accordingly.

Please return the completed questionnaire in the enclosed envelope before the next meeting.

Thank you in advance for your input and co-operation in this important manner.

Regards,

Lodge Secretary

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FORM A2: ADDITIONAL QUESTIONS THAT LODGES HAVE BEEN ASKING THEIR MEMBERSHIP? *

Please rate the following activities or aspects of the Lodge by circling the appropriate response:

Quality of The Work	Poor	Marginal	Fair	Good	Excellent	No Opinion
Banquet Hour	Poor	Marginal	Fair	Good	Excellent	No Opinion
Committee of General Purposes	Poor	Marginal	Fair	Good	Excellent	No Opinion
Masonic Education	Poor	Marginal	Fair	Good	Excellent	No Opinion
Visitation	Poor	Marginal	Fair	Good	Excellent	No Opinion
Communication	Poor	Marginal	Fair	Good	Excellent	No Opinion
Telephone Committee	Poor	Marginal	Fair	Good	Excellent	No Opinion
Golf Tournament	Poor	Marginal	Fair	Good	Excellent	No Opinion
Ladies' Night	Poor	Marginal	Fair	Good	Excellent	No Opinion
Picnic	Poor	Marginal	Fair	Good	Excellent	No Opinion
Spring Dance	Poor	Marginal	Fair	Good	Excellent	No Opinion
Charity within the Lodge	Poor	Marginal	Fair	Good	Excellent	No Opinion
Sponsorship within the Lodge	Poor	Marginal	Fair	Good	Excellent	No Opinion
Mentoring within the Lodge	Poor	Marginal	Fair	Good	Excellent	No Opinion
The Lodge Summons	Poor	Marginal	Fair	Good	Excellent	No Opinion
Degree of Participation by Past Masters	Poor	Marginal	Fair	Good	Excellent	No Opinion
The Masonic Hall Corporation	Poor	Marginal	Fair	Good	Excellent	No Opinion
The level of Brotherly Love within the Lodge	Poor	Marginal	Fair	Good	Excellent	No Opinion

FORM A3: AN EXAMPLE OF A LETTER SENT TO THE BRETHREN BY THE LODGE FACILITATOR *

Dear Brother,

The Brother to Brother Program is an initiative by the Grand Lodge A. F. & A. M. of Canada in the Province of Ontario. The mission is to assist lodges to RETAIN, REVITALIZE and RENEW their membership.

- To RETAIN the interest of brethren who have been masons for less than 1 year.
- To REVITALIZE and maintain the interest of those brethren who attend on a regular or irregular basis.
- To RENEW the interest of those brethren who no longer attend lodge.

On behalf of the Worshipful Master and in my capacity as Brother to Brother Facilitator I have prepared this questionnaire. Please complete it and return it to the Secretary in the enclosed self-addressed, stamped envelope. Your response will help us to gauge the interests of the members of the Lodge and will assist us in the planning of future social and lodge-related functions.

The returned questionnaires will be analyzed and the results will be presented and discussed at our emergent meeting on _____. This emergent meeting has been reserved for Masonic Education, the main topic of which will be the Brother to Brother Program.

Thank you in advance for your reply even though it is to tell us you hate questionnaires or to justify our investment in postage. Let us know that you are there!

Fraternally,

Brother to Brother Facilitator

Worshipful Master

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FORM B: NEW APPLICANT INTERVIEW FORM FOR THE COMMITTEE OF INQUIRY *

B.1 Personal Information

Age: _____

Marital Status: Single Married Divorced Widowed

Companion Name: _____

Present Employment: Retired Employed Self-Employed

Profession _____

Number of Years _____

Residence: Number of years at present address _____

Address:

Physical Disabilities: No Yes: _____

(The purpose of this question is to ascertain if any special requirements are necessary in order to make the candidate feel more comfortable. Are there any injuries or conditions that would prevent the candidate from participating in the degree or making the ceremony less enjoyable, i.e. injured back or knee, etc. Also required per Section 311 of the Constitution.)

Hobbies: _____

B.2 Masonic Application

Any previous applications into Masonry? No ,

Yes , Explain _____

What are your reasons for applying? _____

Why have you waited until now to apply? _____

Why do you wish to join "our" Lodge _____

Do you believe in the existence of a Supreme Being? _____

Does your family and Church support you in becoming a mason? _____

(The purpose of this question is not to question the candidate about his religious or family belief, but to determine that Masonry will not cause any tension between a brother and his family and/or church in case a conflict may occur.)

Have you and your family viewed the "Friend to Friend" or "Circle of Friends" video?
Yes " , No "

Are you aware of the Initiation Fees? _____

The yearly dues? _____

How long have you known your Sponsors? _____

The nature of their acquaintance _____

B.3 Associates

Are any members of your family, Masons? No " Yes " _____

Are any of your fellow workers, Masons? No " Yes " _____

Are any of your friends, Masons? No " Yes " _____

B.4 Duties

Do you have the necessary time to attend lodge regularly? _____

Do you belong to any service clubs? _____

Will you make a daily advancement by studying or contributing to Masonry? _____

B.5 Explain the Objectives of Masonry: (explain to the applicant)

- Provides an opportunity to assist in benevolent work
Provides for a meeting of kindred spirits
Develops friendship and sociability
To practice Masonic Charity

B.6 Masonry is NOT: (make him aware)

- A charitable institution
A social security or a benefit society
A religious society
A political party
An entrance to the business or professional world

FORM C: RETENTION AND RESTORATION: TELEPHONE CALLING PROCEDURE

The interviewer must be prepared. Research will be required to determine why the member stopped attending Lodge. This information is usually available. Remember, we know the what the problem is, try to establish the cause.

C.1 In order to prepare oneself adequately for the interview, the following steps may help you

- a) Review other discussions which may have taken place.
- b) Go over any documentation which may have been accumulated.
- c) Review positive accomplishments of this person.
- d) Have the correct facts to avoid an entirely corrective discussion.

C.2 Opening Remarks

Hello, my name is _____ from _____ Lodge.

Did I catch you at a bad time?

C.3 Type of Questions to Ask?

1. Our records indicate that you are no longer on our active rolls.
2. Is our information correct or did we make a mistake?
3. Perhaps we have failed to keep your interest:
 - We don't want to lose you as a member.
You have worked hard throughout your years as a Mason.
 - You have an investment in your Masonic career.
 - Did you join any other appendant bodies, such as the York Rite, the Scottish Rite or the Shrine?
 - We need you back in the Masonic family.
 - What can I do to help?
 - It would give me a great deal of satisfaction to complete a small questionnaire. (Retention and Restoration Committee Report)

C.4 How to Close the Call

1. I will mail you a Summons from our Lodge, any further information relating to your current status, Demitted, Demitted Dues Owing, etc.
2. Please reply in the self addressed, stamped envelope indicating you want to return to Lodge and/or your comments.
3. Please mail back to me for personal handling.
4. It will please our Master, the Officers and members to hear the good news.
5. Make your cheque payable to _____ Lodge for \$_____.
6. Please return promptly so we can process it at our next meeting.

C.5 Make Good Judgement

- ◆ I am sorry to hear that you have bad health.
- ◆ We all have setbacks.
- ◆ Are you aware that part of your dues was set aside to help others?
- ◆ There is a process available to provide discreet financial assistance.

FORM D: RETENTION AND RESTORATION: PERSONAL CONTACT FORM

_____ **Lodge, No.** _____

D.1 PERSONAL INFORMATION

_____	_____	_____	_____
First Name(s)	Last Name	Spouse	Home Telephone

_____	_____	_____	_____	_____
Address	Apt.	City	Province	Postal Code

_____	_____	_____	_____
Age	Date of Birth	# of Years a Mason	# of Years belong to this Lodge

DATE: _____	_____	_____	_____	
	Initiated	Passed	Raised	Worshipful Master

_____	_____	_____
Grand Lodge Rank	Position	Year of Appointment/Election

D.2 PAYMENT INFORMATION

Total Owing:	_____	_____	_____	_____	_____
	Prior Year	Last Year	Current Year	Total Due	Date Due

D.3 MEMBER INFORMATION (PLEASE CIRCLE)

Interviewer	1st Interviewer	2nd Interviewer	3rd Interviewer
Date Called			
Career Status	Employed Unemployed Retired	Employed Unemployed Retired	Employed Unemployed Retired
Reasons for Not Paying Dues?	Invoice Not Received Invoice Lost Don't Know Amount Owing Cannot Afford Dues	Invoice Not Received Invoice Lost Don't Know Amount Owing Cannot Afford Dues	Invoice Not Received Invoice Lost Don't Know Amount Owing Cannot Afford Dues
Limited Income?	Temporary Long Term	Temporary Long Term	Temporary Long Term
Reasons for Not Attending?	Moved Away Poor Health (Temp) Poor Health (Perm) Confined to Home Confined to Nursing	Moved Away Poor Health (Temp) Poor Health (Perm) Confined to Home Confined to Nursing	Moved Away Poor Health (Temp) Poor Health (Perm) Confined to Home Confined to Nursing
Do You Attend Appendant Bodies	York Rite Scottish Rite Shrine Other: _____	York Rite Scottish Rite Shrine Other: _____	York Rite Scottish Rite Shrine Other: _____

D.4 GENERAL COMMENTS

1 st Interviewer	
2 nd Interviewer	
3 rd Interviewer	

Secretary

Worshipful Master

FORM E: EXAMPLE OF A COMPLETED FACILITATOR PLANNING FORM

Lodge Information

Lodge Name: Anylodge
Lodge Number: ###
District: Anydistrict
Lodge Facilitator: Anybrother

Start Date:

June 1, 1998

The Following (Single) Issue Will Be Addressed:

Lack of Attendance at Lodge Meetings

Goal to Accomplish:

To increase the average number of members in attendance at a regular lodge night by 10 members

A Solution Will Be Developed By What Date:

January 1, 1999

Schedule Of Tasks To Resolve Issue:

Issue Presented to W.M. for Approval to Proceed	June 1/98
Identified Issue Presented to Lodge	June 10/98
Team Assembled to Address Issue	June 20/98
Tasks Assigned to Team Members	June 25/98
Planning Meeting #1	July 10/98
Planning Meeting #2	August 10/98
Solution to Issue Created by Team	August 15/98
Solution Presented to W.M for Approval	August 25/98
Solution Presented to the Lodge	September 1/98
Steps Taken to Correct the Issue	September - December
Task Completed	December 1, 1998
Follow-up Date to Check Status of Issue	March 1, 1999

The Following Steps Will Be Taken To Correct the Issue:

Begin meeting on time. Close lodge before 10pm. Ask more members to participate in degree work (Used Form H). Create a transportation committee to drive those who cannot drive lodge. Hold a 'refresher' night for inactive masons so that no one person is singled out. Provide "hello my name" name badges so that every brothers name is visible to encourage interaction among the brethren.

Was The Plan Successful? How Did it Help The Lodge?

Yes. Lodge attendance has increased from 25 to 35 members per meeting. Brethren are feeling more comfortable talking to each other knowing the names of brethren wearing name badges. (A permanent name badge is being investigated). Closing lodge by 10pm allows the brethren to "mingle" and be on their way home before 10:30pm. Form H provided an inventory of who knows

what degree work to encourage participation. "The W.M. didn't know that so many members had learned degree work and were just waiting to be asked!!!"

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FORM F: BLANK FACILITATOR PLANNING FORM

Lodge Information

Lodge Name: _____

Lodge Number: _____

District: _____

Lodge Facilitator: _____

Start Date: _____

The Following (Single) Issue Will Be Addressed:

Goal to Accomplish:

A Solution Will Be Developed By What Date:

Schedule Of Tasks To Resolve Issue:

Issue Presented to W.M. for Approval to Proceed	_____
Identified Issue Presented to Lodge	_____
Team Assembled to Address Issue	_____
Tasks Assigned to Team Members	_____
Planning Meeting #1	_____
Planning Meeting #2	_____
Solution to Issue Created by Team	_____
Solution Presented to W.M for Approval	_____
Solution Presented to the Lodge	_____
Steps Taken to Correct the Issue	_____
Task Completed	_____
Follow-up Date to Check Status of Issue	_____

The Following Steps Will Be Taken To Correct the Issue:

Was The Plan Successful? How Did it Help The Lodge?

**General
Comments:**

Notes

or

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FORM G: PROGRAM FEEDBACK FORM TO THE REGIONAL CO-ORDINATOR *

IN ORDER FOR YOUR BROTHER TO BROTHER COMMITTEE TO MEASURE THE RESULTS OF THE PROGRAM, PLEASE SUPPLY THE FOLLOWING INFORMATION.

Facilitator: _____	Lodge

District: _____	

Have you met with the Worshipful Master and/or Wardens to further introduce "Brother to Brother" and discuss target areas for its use: <input type="checkbox"/> No, <input type="checkbox"/> Yes
--

Has a plan been presented to the Lodge? Explain	

Has it been accepted by:	
Master and Wardens:	Yes No Positive Negative
Active members:	Yes No Positive Negative
Non-active members:	Yes No Positive Negative

What are the areas of concern for your Lodge	
Explain: _____	

Is there adequate information with the Toolkit, to assist in addressing this concern? _____	

How many members on Your Team? _____
How often do you meet? _____

Do your team members participate in developing plans? _____

Are there any questions, as to the contents and interpretation with the Tool Kit? No, Yes,

Explain:

Is your name listed in the summons as such? No, Yes

Brother to Brother - Facilitator (W.) Bro. Xxxxx, 111-123-4567

Your Brother to Brother Regional Co-ordinator is always ready to assist when called upon, however, the Lodge Facilitator is THE person responsible for this Lodge Driven Program, what success have you experienced in :

A] RETAIN Can you determine how many members have been retained?

How many could be in the future?

Explain:

B] REVITALIZE How many Masons have re-kindled their interest and attendance at Lodge meetings/functions?

C] RENEW - Having reached out to long standing Masons of your Lodge, have you been successful in re-kindling their love of the craft and their active participation in their Lodge? How many?

Explain:

b] Is the program successful in YOUR Lodge? Yes..... No.....

PLEASE FORWARD COMPLETED FORM TO REGIONAL CO-ORDINATOR.

YOUR SUGGESTIONS AND IDEAS ARE WELCOME AND APPRECIATED.

FORM H: DEGREE PLANNING WORKSHEET (THE WORK 1999) *

The following worksheet can be used to collect information regarding who can perform what degree work. It can also be used by the W.M. for planning a degree.

Name: _____ Lodge: _____

Home Phone: _____ Business Phone: _____

Please indicate by marking with an "x" the degree work that you have done in the past. Also indicate what degree work you would like to do, or are currently learning.

Entered Apprentice Degree		Fellowcraft Degree		Master Mason Degree	
Invocation 42-43		Examination B. P. 100-103		Examination B. R. 153-155	
Questions in the West 47-48		Invocation 109		Invocation 162-163	
Instructions at the Altar 49-50		Instructions at the Altar 118		Instructions at the Altar 172-173	
Obligation 51-53		Obligation 119-121		Obligation 173-176	
Floor Work 55-61		Floor Work 121-128		Floor Work Part I 178-187	
				Ecclesiastics 187-188	
				Floor Work Part II 188-192	
				Secret Work 192-195	
Apron Charge 68-69		Apron Charge 136		Apron Charge 197-198	
N.E. Angle (Charity Lecture) 70-74		S.E. Angle 137		Traditional History 198-206	
Working Tools 74-77		Working Tools 138-142		Working Tools 206-208	
Authority 77-78				Exemplification 208-211	

Lecture E.A.D. 80-91		Lecture 2 nd Degree 143-147			
Charge to the E.A. 92-99		Charge to the F.C. 148-152		Charge to the M.M. 212-213	
				Examination A. R. 214-217	
Senior Warden		Senior Warden		Senior Warden	
Junior Warden		Junior Warden		Junior Warden	
Junior Deacon		Senior Deacon		Senior Deacon	
Inner Guard		Inner Guard		Inner Guard	

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FORM I: BROTHER TO BROTHER FACILITATOR FEEDBACK SESSION AGENDA *

Date: _____

Location: _____

Time: _____

Agenda

1. Welcome
2. Introductions
3. Collecting Our Thoughts
4. Feedback - Where are you at in your lodge, Retain, Revitalize or Renew?
5. Wrap Up - Another Session?, Handouts, Thank you
6. Lunch

Collecting Our Thoughts

At what stage is your Lodge with respect to the Brother to Brother Program?

1. Familiar with the Tool Kit _____
2. Communicated with the Worshipful Master

3. Communicated with the Members _____
4. Survey of Lodge - Where can BTB Program help?

5. Some Plans Implemented _____
6. Feedback from those plans _____

Comments (Successes or Problems using the Program)

Sharing Our Ideas (Retain)

Question: Write down five things that your Lodge has done or could do to help a new candidate in his first year as a Mason.

Sharing Our Ideas (Revitalize)

Question: List five ways that the Lodge can revitalize its meetings and/or activities to keep brethren interested and attending.

Sharing Our Ideas (Renew)

Question: List five things that your Lodge has done or might do that could renew the interest of inactive members.

FORM J: ACTION REGISTER FORM (BLANK AND COMPLETED) *

The following two forms can be utilized to identify, plan and summarize the steps that are being taken as Lodge Facilitator.

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FORM K: GUIDELINES FOR THE COMMITTEE OF INQUIRY - A PULLOUT *

The following form is a pull out that can be photocopied and distributed to those brethren who have been asked to conduct a Committee of Inquiry.