

Member Onboarding - Single Point of Contact

Roles and Responsibilities

Roles

- Serve as a Lodge Ambassador
- Serve as the one person responsible for the member onboarding process
- Coordinate, monitor, and be responsible for all onboarding activities, including communication, meetings, scheduling, sponsor related activities, and ensuring stewards are attentive to the needs of the candidate
- Ensure a seamless onboarding experience for the interested individual, applicant, new member
- Maintain continuous contact with the individual during the onboarding process via personal discussions, phone calls, and emails
- Maintain continuous contact with the Master, pre-application and application meeting attendees, sponsors, mentors, and others playing a role in the onboarding process
- Be proactively aware of potential onboarding issues, resolving them in a timely and effective manner
- Continuously seek ways to improve the onboarding process
- Provide appropriate material to the interested individual to expand his Masonic awareness
- Continuously expand personal knowledge of Freemasonry
- Maintain an onboarding schedule that helps provide the Master with the onboarding status for each person and upcoming milestone dates
- Ensure the individual has a schedule of key dates and responsibilities during the onboarding process
- Help the Master plan his degree schedule by sharing membership trends and ensuring a smooth degree schedule, all for the benefit of the candidate and the lodge
- Encourage the Master to move the investigation process forward at a reasonable pace to ensure adherence to the Master's agreed upon degree schedule

Responsibilities

- As Lodge Ambassador, be the first person, on behalf of the Lodge, to officially speak with an interested individual regarding the benefits of Freemasonry and membership in the lodge
 1. Describe your role as Ambassador and Single Point of Contact
 2. If not referred by a current member of the Lodge, determine how the individual learned about Freemasonry that prompted him to inquire into it
 3. Determine why the individual is interested in Freemasonry and his level of interest
 4. Record basic information about the individual including, but not limited to the following: name, address, phone number, email address, age, sponsor's name, belief in a supreme being, marital status, family responsibilities, education history, profession and professional responsibilities, time restraints, geographic proximity to the lodge, if typically available during the night of the Lodge meeting
 5. Discuss the individual's personal interests, hobbies, charitable experience, and family members who are or were Masons
 6. Provide a brief overview of Freemasonry, Masonry in Massachusetts, and the benefits of membership
 7. Answer questions
 8. Determine individual's desire to proceed with the next step, which is the pre-application interview; if the individual is interested in attending a pre-application meeting determine the best day and time to do so
 9. Send a follow-up email to the interested individual thanking him for discussing his interest in the Fraternity, providing electronic material for further study, a description of next steps, and restate your role as his single point of contact, making sure he knows you are always available for questions or concerns
- Notify the Master that a person is interested in pursuing membership and request the names of members who will attend a pre-application meeting
- Schedule the pre-application meeting and invite all participants, including the sponsor, sending reminders as necessary
- **Pre-Application Meeting:** Attend and run the pre-application meeting. Include the reason for the meeting, review of the application process, review of the Statement of Beliefs, and review the background process (At this time, you may also want to invite the individual to a lodge dinner or some other event to showcase the social nature of Freemasonry and to meet other members). Gauge the interested person's desire to move forward in the process. If he does want to proceed then review the application form in detail to ensure the applicant is able to present a completed form at the application meeting. Schedule the application meeting. Ask how satisfied the interested individual is with the process, so far, immediately resolving any issues as they occur. Record the names and position of pre-application meeting attendees.

- Schedule the application meeting and invite all participants, including the sponsor, sending reminders as necessary
- **Application Meeting:** Attend and run the application meeting. Include ample opportunity for questions and answers, review of the application form and list of references, review of the background check process and responsibilities. Accept the completed application and application fee. Review next steps, especially the process for reading the applicant's name in lodge, requesting he notify his references that they may/will be contacted, and the potential vote of the lodge. Review the degree process and his responsibility to attend the degrees, attend the respective Lodge of Instruction meetings, and time commitment to learning a portion of ritual that he will exemplified after each degree. Ask how satisfied the interested individual is with the process, so far, immediately resolving any issues as they occur. Record the names and position of application meeting attendees
- Present the completed application form and check to the Lodge Secretary
- Stay in contact with the applicant during the application process, contacting him after his name is read in lodge and after the vote of the lodge
- After the applicant is accepted to take his degrees, ensure he receives a schedule of events and responsibilities during the degree process
- Work closely with sponsors to ensure the onboarding process is seamlessly followed. Ensure the sponsors are: answering questions, identifying and communicating issues for resolution, ensuring the candidate is progressing appropriately and fulfilling his meeting commitments
- Ensure that during the degree the candidate's needs are met, that they are not put into an embarrassing or uncomfortable position, that at dinner and during social time the candidate is accompanied by his sponsor or replacement
- At the end of the third degree, officially welcome him as a Master Mason and commit to helping him become a respected and productive member of the lodge. Promote the Rookie Award program, encourage him to seek it, and indicate you will help him to attain the award
- Continue to work with the new Master Mason, and his sponsor, to seek out ways to apply his interests, skills, and talents for the benefit of others and the lodge, and especially to get personal fulfillment and a sense of belonging within the lodge