



LEVEL 3: UNIT RESOURCES

Attract > Interview Prospective Members > *Expectation Management*

This thread takes the candidate from the successful conclusion of the interview through to their initiation. As it represents the beginning of the mentoring process, co-ordination of the Members' Pathway passes from the Lodge Membership Officer to the Lodge Mentor.

GUIDANCE FOR ALL LODGE MEMBERS

- All members of the Lodge share in the universal responsibility of welcoming, caring for and supporting the Candidate as they prepare for and becomes a Freemason.
- The Candidate / Initiate will form lasting impressions of Freemasonry based on their early experiences.
- Previous resources in the Members' Pathway have addressed understanding the Lodge and candidates different expectations. This thread involves managing those expectations, delivering what has been promised and avoiding unpleasant surprises.
- If the preparation for Initiation is rushed, or progresses at a pace that is uncomfortable for the Candidate, the consequence may be their early resignation.
- Plan the date of Initiation by balancing the Lodge's programme of ceremonies with the needs, circumstances and interests of the Candidate.
- Ensure that there is sufficient time before the planned date of Initiation for the Candidate to be proposed in open Lodge at one meeting and for their election by ballot to take place at the next meeting.
- While Rule 159 BoC allows for Initiation on the same day as election, unless there are grounds similar to those allowed under Rule 160 to accelerate the process as a matter of urgency, the best interests of the Candidate, and those of the Lodge, are normally served if their Initiation is scheduled for a meeting after that at which they are elected.

SELECTING A PERSONAL MENTOR

- The role profile for Personal Mentors details the main activities that they undertake, as well as the skills and qualities that good Personal Mentors possess.
- Successful mentoring involves:
 - A one-to-one communication process based on a mutually respectful and positive relationship
 - The process is driven by and responds to the needs of the person being mentored
 - The needs are for information, personal contact, encouragement & support, being valued & recognised.
 - People differ in what they need in these four areas, and on how they want their needs to be met.
- Effective Personal Mentors identify, discuss and review these needs with Candidates and new members at regular intervals.
- Effective Personal Mentors also involve the sponsors and other members of the Lodge in providing care and support for candidates and new members.
- Ideally the Lodge Mentor will select one of the Candidate's sponsors to be their Personal Mentor as normally these two will already have a positive relationship.



LEVEL 3: UNIT RESOURCES

Attract > Interview Prospective Members > *Expectation Management*

- In the event that neither sponsor has the time, experience in Freemasonry or availability, or the appropriate skills and qualities, another member may be selected as Personal Mentor.
- If a sponsor is also a new member, the same Personal Mentor may be assigned to support both the sponsor and their candidate.
- Each mentoring relationship should be monitored and changes made if the pairing is not proving effective or satisfactory to the people concerned.

DISCUSSING INITIATION WITH THE CANDIDATE

- When discussing the ceremony of Initiation with the Candidate, strike a balance between telling them too much and not telling them enough.
- Too much prior information may damage the experience. Too little may leave the Candidate with unnecessary or uncomfortable apprehensions.
- The candidate will already have some **information that can be discussed with non-Masons** [support material]. In addition, explain the basic structure of the meeting; Lodge business, ceremony, Festive Board, informal time.
- Avoid describing the ceremony in any more detail than that it involves the Candidate's introduction and identification, confirmation that they meet the qualifications for Initiation, an obligation in which they promise to abide by our rules and customs and an explanation of the symbols of the first degree, after which they will be an "Entered Apprentice Freemason".
- Draw from material held on Solomon, UGLE's online repository of learning materials, and especially the section, "Seek & learn: About Freemasonry", to help you answer any questions.
- Shortly before the day of their Initiation, **brief the candidate** [support material] on what will be expected of them during the meeting.
- If consideration is being given to Initiating to a number of Candidates at the same meeting, discuss the options and process with each of them and address any issues that arise.

GUIDELINES FOR THE PERSONAL MENTOR AND SPONSORS AT THE INITIATION MEETING

- Arrange for one or more of you to collect the Candidate from their home, or elsewhere, and taken to the meeting, and for them to be taken home again afterwards.
- On arrival at the Lodge Rooms, introduce the Candidate to the Worshipful Master and the Junior Deacon before introducing them to, and delivering them into the care of, the Tyler.
- The ideal state in which the Candidate approaches their Initiation is one of anticipation, heightened awareness and mild nerves (comparable to when about to go on stage), surrounded by supportive and encouraging Freemasons who are looking forward to welcoming a new Brother into their Lodge.
- Avoid saying anything, even in jest, that might have the effect of creating concern, anxiety or even fear.



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Even though well intended, misinformation at this stage can have a very damaging impact.

- Arrange seating so that the newly Initiated Brother will be placed and sat next to one or more of you at the end of the ceremony.
- Have some cash for them for the alms collection and a copy of the words any Closing Ode.
- In some Provinces, Lodges present an introductory booklet to the Initiate during or shortly after the first meeting, increasingly nowadays at the Festive Board.
- In any procession from the Lodge Room after the meeting, remain with the Initiate as they walk out.
- Prepare a **brief oral summary of the ceremony** [support material] for the Initiate, to explain its meaning and significance.
- Find an opportunity and take the time to deliver this summary before they return home. One opportunity would be at the festive board immediately prior to proposing the toast to the new Initiate.
- At the same time, check their response to the ceremony and address any questions or concerns.
- Provide a written copy of the summary for them and explain that this can be shared with their family on their return home.



LEVEL 3: UNIT RESOURCES

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- Introduce them to other members of the Lodge, taking care not to overwhelm them.
- Arrange to sit with or near the Initiate at the Festive Board.
- During the meal explain to them the toasts that are taken, as well the firing routine, and provide them with a copy of the words of any songs.
- Remind them that they will be asked to respond to a toast to their health. Write out the preamble for them and provide any further guidance or help they require.
- Before the end of the meeting, arrange to meet the Initiate during the next week or two.
- Explain that the purpose of that informal meeting is to:
 - discuss what happened during their Initiation and what they need to know for the immediate future.
 - practise with them the sign of the degree, and any firing undertaken at the Festive Board.
 - address any questions that they may have at this point.

DISCUSSING INITIATION WITH THE CANDIDATE

The next element in the Members' Pathway provides guidance as to how to engage with and support the new member of the Lodge after the day of their Initiation.

Note: The names used to refer to the Lodge's meeting place and the after-proceedings differ from Province to Province. For the sake of simplicity, they are referred to in the Members' Pathway as the Lodge Room and the Festive Board, respectively. Similarly, for ease of reading all references to Provinces should be taken to apply equally to Metropolitan and District Grand Lodges.