



FREEMASONS
OF BRITISH COLUMBIA
AND YUKON

Steps to Initiation

A Revised & Simplified Candidate Selection Process.

Universal Format for use in the Grand Jurisdiction of BCY

Revised September 2018

By Robert W. Sault, W.M (2018)

Background

Keeping Brothers involved and engaged in the Lodge is an ongoing and sometimes challenging process that demands constant attention and evolution. With the ever-increasing demands on a man's attention in the 21st century, it is more important now than before, to ensure a strong suitability of potential Candidates coming into Freemasonry. Like it or not, young men have higher expectations on life, particularly in the areas of career, social engagements, money, spirituality and family. What kept our Brothers, born before 1975, active in a Masonic Lodge is completely different than those born after 1975. Many young men these days are looking beyond what organized religion and society can offer them. The difference now is they place a higher demand on reciprocity than did previous generations. The benefits for the individual far outweigh the benefits for the collective in these later generations. We must accept, face and address this fact if we are to survive as an organization. Freemasonry will still and always remain a vital, integral and continual moving piece in the society around the globe. However, in order to evolve with Society and remain strong, certain changes outside of the constitutions, ritual work, and traditional customs need to happen. An important step of competently attracting new members and retaining them, is managing expectations. Typically, in the past, a Masonic Initiation was kept secret as the Candidate was not told of any memory work.

All too often, a newly initiated Entered Apprentice would suffer poorly due to inconsistent Lodge Mentorship and active involvement. In fact, many Lodges in the area would put the Candidate through the three degrees only never to see him again because of system overload. Furthermore, in today's world, due to the Internet, social media, and population of many centers, we can no longer sponsor a man into Freemasonry over a couple of cups of coffee, or after a few beers on some social nights. These aforementioned "criteria" are totally derisory and do not reveal a man to be good "mason material." *First impressions set the stage for engagement and retention!*

The Grand Lodge of Washington State uses the 6-step program quite diligently across most of their districts with great results. <https://freemason-wa.org/six-steps-initiation/>

Examples to engage and retain Entered Apprentices include, but are not limited to:

- place photo and short bios of new Entered Apprentices in the Lodge
- have the candidate complete skills and interests' questionnaire so we can get to know a little.
- invite the Entered Apprentice to numerous Lodge events, and Installations.
- new member orientation - share the mission statement, provide an "education binder" are all examples.

The 6-step program has proven useful when employed properly. However, the largest complaints about it are: too much paperwork, too cumbersome, "scary," a lack of consistent usage, and unfamiliarity.

This revision, based on the original **Grand Lodge of British Columbia & Yukon 6-step Program** has been revised, simplified, and stripped of all non-essentials - reducing committee chairman, officer and secretary paperwork burden together with refining the standardized questions, checklist, and memory test to the advantage of the Candidate and the Lodge. It is the intent of the author to improve and facilitate a healthier recruitment process, together with improved Lodge harmony, and promote more vigorous membership within the Craft.

Fraternally,



WBro. Robert W. Sault (Worshipful Master 2018, Miriam Lodge No. 20, Vernon BC)



Candidate Selection Summary Report

STEP ONE - Setup the Meeting

Refer to the Guidelines for suggestions to approach this phone call.

Return phone call made Date: | |

Does candidate wish to meet in Person? Yes___ No___

Is the candidate serious about a life in Freemasonry? Yes___ No___

Did the candidate ask any questions about the meeting? Yes___ No___

Ask: "What Do You Know About Freemasonry?"

.....
.....
.....

STEP TWO-Face to Face Meeting & Assign Memory Test

Refer to the Guidelines for suggestions on this meeting

Reason for interest in Freemasonry?

.....
.....
.....

Did Candidate bring any written questions? Yes___ No___

Was the Candidate on-time for the meeting? Yes___ No___

Was the Memory Test Explained? (i.e. Obligations, Dedication etc.) Yes___ No___

Can the Candidate complete the memory test within 2-months? Yes___ No___

STEP THREE - Second Meeting & Evaluate Assigned Memory Test

Refer to the Guidelines for suggestions on this meeting

Did the Candidate memorize the Lecture - *The Ideal of a Freemason*?

Did the Lecture describe who the candidate would like to become? Yes___ No___

Notes on this evaluation:

.....
.....

Did the candidate find the memory test challenging? If yes, how many prompts? Yes___ No___

.....

STEP FOUR - Third Meeting (Social & Introduction to Members)

Refer to the Guidelines for suggestions on this step

Was the Candidate able to carry on a good conversation with the other Members of the Lodge?

Notes on your discussion:

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.....
.....
.....

Was the memory test completed in front of two members, including either the Worshipful Master, or Committee Chairman?

Yes___

No___

-> Lodge Social Event Attended

Friday Socials.....

Summer Picnic

Christmas Party

Meeting Night, Date

Other

Feedback from the other Brethren present?

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.....
.....
.....

STEP FIVE - APPROVAL & SUBMIT PETITION

If the Candidate has passed all steps, this checklist shall be submitted to the principal officers for evaluation prior to submitting the petition in open lodge.

Are both sponsors prepared to mentor this candidate?

Yes___

No___

(If no, is further time recommended?)

Has a Mentor been assigned?

Yes___

No___

Who?

Petition Sent to Lodge Secretary

Date | | 20.....

Additional Information:

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.....
.....
.....



Suggested Guidelines

STEP 1 - The Phone Call & Meeting Setup

(setup a time and place for approximately 45-minute meeting)

Question 1. Hi (Name), my name is John Doe; I am a member of Lodge No. I understand that you have expressed interest in becoming a Freemason?

Question 2. So....(Name), what do you know about Freemasonry?

It is important that you listen carefully to this answer and make key notes on the Summary Check List.

That's a good start (Name) A lot of people who approach us are simply curious and their interest is trivial, sometimes they think they are going to learn all kinds of secrets but they never do. If your interest is trivial I can answer your questions over the phone right now and save us both some time, but if you are serious about a *life* in Freemasonry then I suggest that we meet up for a coffee and get to know each other a little. Would you like to do that?

YES ___ He's Serious about a *Life* in Freemasonry

NO ___ Trivial interest

STEP 2 - The First Meeting & Assign the Memory Test

Question 1: Well (name) what brings you to Freemasonry?

- Did you bring your list of questions we talked about you putting together on the phone? *Go over these and answer them for the candidate!*
- Explain the Traditional Approach typically done in the past, and why it's no longer effective. This ensures the candidate knows he's of equal opportunity in our screening process (*no hard feelings*)

Question 2: Well.....(name), since you seem very intent and keen to join Freemasonry, before we can proceed further in the initiation process, we require you to memorize a brief lecture. The purpose of this memory test is three-fold. First, we are testing your determination, and commitment, which Freemasonry requires of its Members. Secondly, in going through the first three degrees of Masonry, you are required to memorize an obligation prior to advancing, and Third, if taking a leadership role in the Lodge is something that might interest you; being good at ritual is required in the senior chairs.



FREEMASONS
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First Meeting Hand-out
Steps to Initiation
Candidate Copy
(Maximum of 4 prompts allowed)

The Ideal of a Freemason

If you see a man who quietly and modestly moves in the sphere of his life; who, without blemish, fulfils his duty as a man, a subject, a husband and a father; who is pious without hypocrisy, benevolent without ostentation, and aids his fellowman without self-interest; whose heart beats warm for friendship, whose serene mind is open for licensed pleasures, who in vicissitudes does not despair, nor in fortune will be presumptuous, and who will be resolute in the hour of danger;

The man who is free from superstition and free from infidelity; who in nature sees the finger of the Eternal Master; who feels and adores the higher destination of man; to whom faith, hope and charity are not mere words without any meaning; to whom property, nay even life, is not too dear for the protection of innocence and virtue, and for the defense of truth;

The man who towards himself is a severe judge, but who is tolerant with the debilities of his neighbor; who endeavors to oppose errors without arrogance, and to promote intelligence without impatience; who properly understands how to estimate and employ his means; who honors virtue though it may be in the most humble garment, and who does not favour vice though it be clad in purple; and who administers justice to merit whether dwelling in palaces or cottages.

The man who, without courting applause, is loved by all noble-minded men, respected by his superiors and revered by his subordinates; the man who never proclaims what he has done, can do, or will do, but where need is will lay hold with dispassionate courage, circumspect resolution, indefatigable exertion and a rare power of mind, and who will not cease until he has accomplished his work, and then, without pretension, will retire into the multitude because he did the good act, not for himself, but for the cause of good!

If you, my Brethren meet such a man, you will see the personification of brotherly love, relief and truth; and you will have found the ideal of a Freemason.

STEP 3 - Second Meeting & Memory Test Evaluation

Did the candidate memorize the Lecture: *The Ideal of a Freemason*? Yes___ No___

Let me ask you, does it describe who you are, or who you would like to be? Yes___ No___
(If the answer is in the negative, then the interview is over!)

If positive, explain to the candidate that every time new officers are installed in a lodge, this lecture is delivered to remind us all of how we should strive to lead our lives as Men.

I would like to talk to you today about **(your lodge)** our mission statement, our structure, and our purpose if that's OK with you?

Describe our Lodge and provide Candidate with a BRIEF overview of how it functions:

- Lodge Mission Statement
- The Offices and Titles
- The typical progression of a Mason (*Where he will start etc.*)
- Appendant Bodies - Scottish Rite, York Rite.
- Dress Code
- Special Events and Socials.

STEP 4 - Third Meeting (Social & Introduction to other Members)

(This should be a warm and friendly meeting without too much talk about Freemasonry.)

Well (Name) I would like you to meet Brother.....

He is X (state his position) at **(your lodge)**, and I have asked him to co-sign your application along with me. I have told him about our previous meetings but I'm sure in time, he will have some questions of his own to ask you. *Potential co-signer satisfies himself that the candidate is viable.*

Choose the next major social where the family or wives are welcome, including a repast. Explain to the candidate it will probably cost some money, which will be used for a worthy local charity, and that everyone pays.

Explain to him the importance of harmony in the Lodge, and with each other. Our lodge is a very harmonious place. We choose to be there, spending time with people we enjoy being with, people who share the same ideals, who support each other's families and who can become good friends.

STEP 5- Approval and Submit Petition

(Review these Guidelines Carefully, prior to Submitting Petition)

(Review Checklist with Principal Officers)

- I. How Did He Enjoy the Social event or Events? *(jot down some notes on the checklist)*
- II. Did any Brothers during any Social Interactions have any concerns? *(If so, explain)*
- III. Describe All Steps to Candidate - i.e. Review, Petition Signatures, Submit to Lodge, Balloting procedures.
- IV. Instruct Candidate what to wear on Initiation night.
- V. Inform the Candidate he will be assigned a Mentor in the Lodge.
- VI. Inform Candidate of Yearly Dues, Fees, and Recurring Expenses.
- VII. If the Candidate has more than 4 prompts with the memory work, then a “redo” and more time is required.
- VIII. If the Candidate has attended numerous socials and appears very keen to join, or a member has known the candidate for at least 6 months, in a friendship capacity, then the process can be streamlined by having him fill out the questionnaire and passing the memory test, which, assesses his dedication and desire to join Freemasonry.

This Space Intentionally Left Blank



Candidate Questionnaire

Please Complete and return at your second meeting along with your Memory Test

The TRADITIONAL APPROACH

As an individual, seeking further information and a possible *life* in Freemasonry it is important that you understand how things have traditionally been done. In the past most people who approached Freemasonry, came well recommended by another freemason. They were either a family member, a longtime friend, a workmate or a neighbor, and some freemason could vouch as to their character. Today's world is very different and many men, just like you, contact us *via* the internet or by telephone. As we have yet to establish a personal relationship, it is not possible for any Freemason to sponsor an application under these circumstances. In order to overcome this challenge, it is necessary to plan a series of meetings so that both parties can get to know each other and to give you a chance to learn about our fraternity. Every new candidate for Freemasonry must be sponsored by two freemasons who are members in Good Standing of a Masonic Lodge.

Are you okay with this approach?

Yes___ No___

Candidate Questionnaire

Freemasonry is *not* for everyone and we need to find out if it is suitable for you. This is done with your best interest at heart, for if you are not suited we would rather find out *before* you have spent your valuable time and money, rather than after.

1. *While we admit men of all Faiths, in order to become a Freemason, it is necessary that you believe in A Supreme Being.*

Do You Believe in a Supreme Being?

Yes___ No___

2. *If your interest in Freemasonry is an attempt to tap into a large membership base for the purpose of furthering your personal interests, this has never worked in the past and will not work now. Freemasons do not support this type of activity.*

Do You Understand This Important Point?

Yes___ No___

3. *Becoming a Freemason is **not** an event; it is **not** something that you decide to do on a Thursday here and there. Rather, it is a process, it takes time, both mental and physical, it costs money, and it requires a strong commitment on your part and also on the part of the lodge that receives your petition.*

Do You Understand This Important Point?

Yes___ No___

4. *Freemasonry is typically a lifetime commitment and most Freemasons remain active until death.*

Are You Prepared to Make Such a Commitment?

Yes___ No___

5. *The members of the Lodge you are petitioning will want to meet your family and answer their questions as well. If your wife or family does not fully support your decision, your application will likely be rejected. Additionally, Freemasonry is not a "social club" or a charity. We do require an active level of participation from our members beyond social gatherings.*

Do You Understand These Important Point? Yes___ No___

6. *During the course of getting to know you we will ask you to attend some of our social functions or to attend after our lodge meeting so you can meet some of the members. This will give you a chance to determine whether you like them or not and if they like you. It is important that we like each other to ensure harmony in our Lodge.*

Are You Okay with This Approach? Yes___ No___

7. *We expect that you are seeking not only to improve yourself but also humanity through service to your local community in some form.*

Would This Be a Valid or Correct Expectation? Yes___ No___

8. *You will be expected to ascribe to a high moral standard while dealing with others. Particularly with your brethren in Freemasonry.*

Is This What You Want to Do in Your Life? Yes___ No___

9. *You will be expected to commit certain lectures to memory and then repeat them from memory to in open Lodge.*

Would You Be Comfortable with This? Yes___ No___

Finally, **no one is ever asked to become a Freemason**, you must approach Freemasonry. With this understanding it will be **your** responsibility to call and arrange when you're ready to take the next step.

My Contact information is Name:

Phone:

Email:

*In this getting-to-know stage, you will **never** be called after this meeting. If our phone does not ring, we will know that you will not be proceeding!*