LEVEL 3: UNIT RESOURCES



Attract > Interview Prospective Members > Enguiry Management

Independent Enquiries (support material) Case Study: Yorkshire and West Riding

ONE APPROACH TO INDEPENDENT ENQUIRIES

Yorkshire and West Riding

The Province of Yorkshire and West Riding has an established **process for management of Independent Enquiries** (formerly known as Unsponsored Candidates). This process has evolved through trial and error, but improves through review and the drive to enhance the experience for everyone involved.

The process requires a commitment:-

Provincial Membership team

Promote and oversee the whole project, facilitating the training and supporting of Area Teams and Lodges.

Provincial Enquiry management team

Process the Independent Enquiries, and conduct the first calls/engagement with the person enquiring.

Commitment from Area Membership Officers

Conduct the second screening calls / in-person meetings, support enquiries, liaise with Lodge Membership Teams, and may attend Initiations as a friendly face.

• Buy-in from Lodges

Provide Lodge Outlines and Information Sheets (without these, Independent Enquiries not allocated to a Lodge), engage with prospective Candidates, and give feedback to the Provincial Membership Team.

• Support from the Province with IT

Provide resources and technical support (delivered by members with the skills, who have developed and manage the CRM database for enquiries)

Provincial Communications team

In liaison with the Membership Team, have developed a suite of physical and virtual resources that can be used to promote Freemasonry and channel all enquiries through the Provincial website form.

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Process Chart

Training Members to be Proud	Ensuring the Membership Challenge is understood by Lodges	That members are able to speak with Pride about their membership		
Securing Buy-in from Provincial Team, Area Reps and Lodges	Ensure all parties are willing to follow the process and provide information when needed.	Remind Lodge Membership Teams Independent Candidates are only on source and this should not stop Lodges seeking to find their own (Direct) Candidates.		
Promotional Materials	Developed online Enq Form	Posters for Masonic Halls open to public with QR Codes to register interest in Joining	Pull Up Banners for Events with 'attraction' message and QR Code	Targeted digital marketing campaigns
Website Form	Registering Enquiry details in a clear way	Captures key details of the individual including email and phone number		
Added to CRM	Eng checked by Provincial Membership Team and added to CRM	Automatic email and SMS sent to the enquirer to say member of Membership Team will be in contact within 48 hours and the email may have gone in SPAM	Enquiry Allocated to a Member of the Provincial Team to conduct the initial screening	
Initial Screening	Done by trained member of the Provincial Membership Team	Looks to secure answers to all key questions but also learn more about the individual to gain information which could assist with allocation to a masonic centre	All information shared is recorded against the enquirer's profile so infomation is there for others to refer to	
Allocation to Group / Area Membership Officer	Initial contact by phone that is than followed up in person	Meet to discuss interests, motivations	Use Lodge Outlines to match the enquirer	Share Lodge Information sheets to the enquirer to help them make and informed decision on whom they would like to speak to
Introduced to suitable Lodge	Introduction to suitable Lodge facilitated by Area / Group Membership Officer	The Provincial Team 'hands over to the Lodge Membership Team' but remains in contact with the enquirer to provide support if needed		
Lodge Membership Team	Informally meet with the enquirer and screen to ensure they are a fit for the enquirer and the enquirer is s fit for them	If all positive proceed to interview - any issues refer back Group / Area Membership Officer (either way keep them updated)		
Lodge Interview / Introduced alternative Lodge	When an the enquirer reaches this stage an interview may seem like over kill but is a final chance to ensure each party is happy.	The interview should be conducted using the good practice in Building Together> Attract>Interview Prospective Members>the Interview	Should there be any questions or concerns assistance should be sought from the Provincial Team	The Outcome of the interview and date for initiation should be communicated to the Provincial Membership Team
Expectation Management	If it has been a while since the Lodge has had a candidate time should be spent reminding members of Good Practice in supporting the candidate	For the Candidate (no longer the enquirer) they will need support on what they should expect	Candidates will be interested in attending social events	
Initiation	ensure the Provincial Team is updated of when the meeting is	update the Provincial team when the Initiation has happened / of any issues		







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This is a short summary – if you have specific questions please contact

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