



Six steps to initiation

A Guide to the Candidate Selection Process

This document is designed to be used for the pre-screening of all candidates prior to the Petition for Initiation being presented to them. It is a tool to help evaluate potential members and determine their suitability for membership in your lodge. We know from experience that Freemasonry is not for everyone and we need to determine, as best we can, who it is for and who it is not for.

You are encouraged to use this guide in its entirety, fulfilling each step and then completing the final checklist summary report. This will then be presented to the lodge, evaluated by the principal officers, and if acceptable, a Petition for Initiation will be issued. The Guide and the Petition will be given to the investigating committee to assist them in the interview process.

The Candidate Selection Process consists of six steps:

1. The initial response to the candidate (Set the meeting)
2. The first meeting with the candidate (Homework)
3. The second meeting with the candidate (More homework)
4. The third meeting with the candidate (Introductions to other members)
5. The fourth meeting with the candidate (Social function)
6. The Petition and sponsor signatures

These steps are a guide, and are outlined in more detail on the next few pages; with a general recommendation on how to approach each step. Steps two and three have a two-page hand-out that you will present to the candidate for completion and return at the next meeting. They will be included in the final check list and should form part of the summary report.

Candidate Selection Summary Report Checklist

STEP ONE

Refer to the Guideline notes for a suggested approach on how to conduct this phone call.

- Return phone call made. Date: | |
- Does candidate wish to meet? Yes No
- Is the candidate serious about a *life* in Freemasonry? Yes No
- Was candidate asked to write a question list and bring to the first meeting? Yes No
- What does the candidate know about Freemasonry?

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STEP TWO

Refer to the Guideline notes for a suggested approach on how to conduct this meeting.

- Reason for interest in Freemasonry:
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- Did candidate bring questions? Yes No
- Were your answers satisfactory? Yes No
- Traditional Approach explained? Yes No
- First Meeting Questionnaire provided and explained? Yes No
- Is the candidate prepared to answer and return the questionnaire at your next scheduled meeting? Yes No

STEP THREE

Refer to the Guideline notes for a suggested approach on how to conduct this meeting.

- Did the candidate find and read the lecture *The Address to the Brethren*? Yes No
- Did the lecture describe the candidate or who the candidate would like to become? Yes No
- Notes on this discussion:

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- Did the candidate find and read the Grand Lodge PDF booklet? Yes No
- Notes on any discussion regarding the booklet:

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- Did you go over the lodge positions and briefly explain them Yes No
- Did you go over the three degrees and briefly explain them Yes No
- Did you go over a typical lodge meeting and refreshment Yes No
- Does the candidate understand the expected dress when attending lodge Yes No

STEP FOUR

Refer to the Guideline notes for a suggested approach on how to conduct this meeting.

- Was a topic of interest from the Grand Lodge website selected and discussed: Yes No
- Notes on your discussion:

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- Was the memory work completed? Yes No
- Did another brother attend? Yes No

STEP FIVE

Refer to the Guideline notes for a suggested approach at these meetings.

- Major lodge social event attended
 - Game Night
 - Dinner event
 - Other
 - Meeting Night, Date
 - Meeting Night, Date
 - Meeting Night, Date
- Meeting night evening festive board
- Any feedback from the brethren of the lodge?

Summer Picnic

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STEP SIX

Refer to the Guideline notes for suggested communication at this step.

- Are all sponsors prepared to sign the petition? Yes No
- Petition presented to lodge secretary If no, is further time recommended?
- Date | | 20..... Yes No - not a good match
- Any additional information: Yes No

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Suggested questions

STEP 1 - *The phone call*

Q: 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?

A: if YES reply with: That's great (Name), we are always happy to welcome well informed and sincere men into our fraternity.

if NO your conversation is short.

Q: So (Name), what do you know about Freemasonry ?

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

Q: 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 for a coffee and get to know each other a little. Would you like to do that?

A: YES serious about a *life* in Freemasonry

NO trivial interest

Q: Okay, it would be helpful if you were to make a list of any questions you may have and bring it with you to our first meeting. This will be your chance to find out everything you ever wanted to know about our fraternity. I will personally answer all of your questions for you, honestly and completely.

** Set the time and place for a 45 minute meeting.*

STEP 2 - *The first meeting*

Q: Well (Name) what brings you to Freemasonry?

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

Q: Did you bring your list of question we talked about you putting together on the phone?

Go over these and answer them for the candidate.

Q: Good questions but there are a few things that were not addressed that we should go over.

Give the candidate the First Meeting two page hand-out.

Explain the Traditional Approach typically done in the past.

Explain each of the important points for the candidate to take home and think about before ending the meeting. Use this two page hand-out to help explain to the candidate this is a *life* decision.

Explain the homework assignment to the candidate in the hand-out.

STEP 3 - The second meeting

Q: **Did the candidate find and read the lecture *The Address To The Brethren*?** Yes No

Let me ask you, does it describe who you are, or who you would like to be? (*If the answer is 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 all of us of how we should live our lives.

Q: I would like to talk to you today about our lodges and our structure.

This meeting should be to describe everything about our lodge and how it functions.

- The physical layout of the lodge room and why.
- The regalia
- The offices and titles
- The progression
- The three degrees
- Where he will start
- The refreshments
- The special events
- The dress code
- Anything else you can think of.

There is some additional research I am going to ask you to do and I have some memory work for you to learn for the next meeting.

Do you have any problems with this? Yes No

STEP 4 - The third meeting

This should be a warm and friendly meeting without too much talk about the Craft

Well (Name) I would like you to meet (Lodge Member)

He is a member of our 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 over this and the next few meetings.

Did you do that research on the Grand Lodge web page Yes No
and choose a topic for brief discussion today?

Were you able to memorize that small piece I gave you at our last meeting? Yes No

Being able to do this is quite important in Freemasonry so it is good to know that you are not uncomfortable with it. This is something we all have to do so go ahead read it back to us from memory.

Explain to the candidate that the series of meetings after this are going to be in a social environment with other members of the lodge.

Choose the next major social where the family or wives can participate if possible.

Explain to the candidate it will probably cost some money, which will be used for a worthy cause. Everybody pays.

Also encourage the candidate to attend two lodge meetings for dinner before the meeting and/or refreshment after the lodge closes. If there is no major social in the near future then have him attend at least two lodge meetings to get him and the members comfortable.

Advise the candidate these social meetings will give him a good chance to meet our members and get to know them a little. While there, he should be asking himself if these are the type of people he would like to spend a good portion of his time with. If the answer is no, then he should not proceed. Tell him that the members will be asking themselves if he is the type of person they want to have in their lodge, will he fit in.

Explain to him that this is a really important step because if there is no harmony we must not go forward.

Explain that this may seem a bit overboard to you but please consider this. 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 the same charities, who are good friends, who are there for each other when needed and who share the common bond of Freemasonry. This is unique in this world and we just want to be sure that nothing enters our door that would interfere with that harmony. Once you enter our lodge you will know exactly what I am talking about.

STEP 5 - The social meetings

This is a social event, the candidate and spouse should be made very welcome and should be made to feel at ease very quickly. Make a fuss of his wife if she is able to attend.

There is nothing else to do at these social meetings but have fun and talk about whatever comes forward. His behavior and our instincts and observations will tell us whether he can be one of us or not.

STEP 6 - The petition

How did he enjoy the social event or events? Make sure you meet him socially at least three times so you both have some context with this.

We would like to describe to you what happens after your petition has been signed.

- Presented in open lodge for all to hear.
- Examination committee is appointed to interview you and your wife at your home.
- Committee makes their report to the members of the lodge.
- The members then vote on your acceptance into the lodge
- If favorable, you will receive a notification from the lodge secretary asking you to attend on a specific date in order to be initiated into Freemasonry.



Second Meeting Hand-out Candidate Copy

Please return at your next meeting

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 different and many people, just like you, contact us *via* the internet or by telephone; there is no personal relationship, we know absolutely nothing about them, and it is not possible for any freemason to recommend anyone under these circumstances. In order to overcome this, it is necessary to schedule 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 lodge. The two members must sign a statement that they know you and can vouch for you and your character. The intention of the meetings suggested here will be to meet with this as our goal.

Are you okay with this approach?

Yes No

Some very important points you should know about.

Freemasonry is *not* for everyone and we need to find out if it is suitable for you. This is done in your best interest for if you are not suited we would rather find out before you have spent your valuable time and money, rather than after. These points are a first step in help us with that.

1. If your interest in Freemasonry is at all some attempt to tap into a large membership base for the purpose of furthering your career or business 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

2. Becoming a freemason today is *not* an event; it is *not* something that you decide to do on Monday and it is done next week. Rather, it is a process, it takes time, both mental and physical, it costs money, and it requires commitment on your part and also on the part of the lodge that receives your petition.

Do you understand this important point?

Yes No

3. Freemasonry is a lifetime commitment and most freemasons remain active until death.

Are you prepared to make such a long-term commitment?

Yes No

4. As a freemason it would be required that you attend your lodge regularly. There is no point in joining if you don't attend as regularly as you can. In most lodges this would require a minimum of two meetings a month, sickness, emergencies, family or work obligations excepted.

Are you prepared to make this type of commitment?

Yes No

5. Freemasonry costs money. There will be a one-time initiation fee of \$..... There are also annual dues that *must* be paid by the first of January each year. In this lodge they are currently \$.....

Would this financial requirement present a problem for you?

Yes No

In addition to the above there are other financial expectations in the form of raffle tickets, food, charitable contributions *etc.* It is not unusual for freemasons to contribute on a regular basis.

Are you okay with these expectations? Yes No

6. 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 may be rejected.

Do you understand this important point? Yes No

If you think that Freemasonry will interfere in any way with your family or your career; you should not proceed.

Do you understand this important point? Yes No

7. 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.

Are you okay with this approach and concept? Yes No

8. We expect that you are seeking not only to improve yourself but also humanity through service. Would this be a valid or correct expectation? Yes No

9. 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

10. We want candidates to be fully informed when they join us. We want them to know exactly what it is that they are getting involved in. We will tell you what we can but this will also require some research on your part.

Are you interested enough to do this research? Yes No

11. You will be expected to commit certain lectures to memory and to repeat them from memory to the lodge.

Would you be comfortable with this? Yes No

12. Finally, no one is ever asked to become a freemason, you must approach Freemasonry. With this understanding it will be your responsibility to call to arrange each of our next few meetings.

My Contact information is: Name:

Phone:

Email:

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