

How to Get Started with Outreach

A Guide to Contacting Masonic Family Members

1. Reasons to call

Wondering when an outreach call might be needed? Here are some common situations in which a member might benefit from an outreach call.

- A member no longer comes to lodge or lodge events
- Someone has expressed concern over a member
- A member has expressed personal concern or has mentioned needs
- A member appears to be in need
- A member is new to the lodge and might not understand his benefits
- A sweetheart has been recently widowed

2. Know who you are talking to

Before you contact a member in need, make sure you know basic information about the member and situation.

- Research member information
 - Are they married?
 - Where do they work?
 - How long they have been in the fraternity?
- Talk with a member/widow who knows the member you're reaching out to
 - What has their interaction been like?
 - Does the member seem to be shy or outgoing?
 - Are there any points of sensitivity to be aware of?

3. Reach out by phone

- Be sure to introduce yourself and state the purpose of your call
- "Create an opportunity": Make it a point to provide interesting, relevant information, such as:

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- Asking if they receive and/or read the lodge's Trestleboard – share something interesting in the most recent issue.
 - Invite them to an upcoming program or event – offer to pick them up.
 - Explain that you are calling to provide information about Masonic Assistance – after providing basic details, ask if you can mail them more information.
 - Offer to make a home visit to meet with them in person.
 - For additional assistance, refer to the **Phone Script: Outreach to Masonic Seniors** and **Phone Script: Outreach to Sweethearts**.

4. Conduct a face-to-face meeting

- Begin by introducing yourself and your role in the lodge again. Thank the member for taking time to meet with you.
- Engage the member in light and friendly conversation, beginning by asking how they are doing today.
- Ask "ice-breaker" questions to help make the member feel more comfortable with you:
 - Masons
 - What brought them into the fraternity?
 - Establish commonalities (military experience, interest in sports, children, etc.).
 - Wives/sweethearts
 - Ask them about their husband's involvement in Masonry.
 - Were they involved in OES or the youth orders?
 - Ask about their family and children.
- Demonstrate sincere interest in what the member is saying. Respond in a supportive manner. Show acceptance or a desire to understand their experience, fears, and points of view.
- Assess the member's health, mood, and living situation by referring to the **Home Visit Checklist**.
- Invite them to an upcoming lodge event.
- Have resources and information available on hand about Masonic Assistance, should they need support now or in the future.

If the member is experiencing challenges

- Ask the member what they'd like to see happen – what their desired outcome is.
- Rather than trying to “fix” their problems, empower them by asking how you or your lodge might assist them in reaching their outcome.
- If appropriate, refer them to Masonic Assistance for further support.

5. Follow up

- Before leaving, let the member know when they can expect to hear from you again.
- Plan to make follow up calls and/or visits to assess their ongoing needs.
- Send additional resources and information, if needed.