

GENERIC SCRIPT:

Contacting Members regarding Remitted Dues

Here are the main points to hit in the conversation:

1. Does the member need his dues remitted and if so, why?

2. If the reason is economic hardship then:

- If the member is under the age of 60, ask if they are interested in Care Management support through the Masonic Family Outreach Program (MFOS). This program can provide Information & Referrals as well as assistance with applying for low-cost programs, job search efforts, housing resources, etc.
- If the member is 60 years old or older, ask if they are interested in seeking services through the Masonic Senior Outreach Program (MSOS) or the Masonic Homes? MSOS can provide information & referrals; care management support; and financial assistance if there is a qualifying need.
- If the member is a CA Mason (EA, FC, or MM) and recently experienced a financial hardship due to natural disaster or personal disaster, they can apply for Distressed Worthy Brother Fund (DWBF) that provides Care Management and Financial Management.

3. If the reason is that the member or spouse has memory issues or physical issues that prevent the member from participating in their lodge, then:

- Ask the member or wife or caregiver how they are doing with meeting the needs of the member or the spouse. If there is a need for in-home care, care management or possibly the need to move into a community then share with them about the MSOS Program and/or the Masonic Homes.

4. Ask how can the lodge better support the member?

- Is the member interested in having visits, rides to lodge, assistance with household duties? Does the member/spouse read the Trestleboard? Are they involved with OES or other Masonic bodies for support?

5. Thinking beyond the reason that dues are remitted, what else might the member need or is interested in?

- Does it warrant having the member/spouse call Masonic Assistance? If so, how can the lodge assist the member/spouse to ensure this happens?

6. How can the lodge maintain communication with the member/spouse?

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Suggestions to starting the conversation:

“Good morning/afternoon, this is Brother _____ from _____ Lodge calling. I am the Lodge “Master/Secretary/Warden” and I am reaching out to all of our brothers whose dues have been remitted this past year to see how they are doing and if they need anything.”

“Good morning/afternoon, this is Brother _____ from _____ Lodge calling. I am the Lodge “Master/Secretary/Warden” and I wanted to introduce myself and to see how you are doing? I am personally calling all of our brothers with remitted dues. The lodge is more than happy to provide this to you and I wanted to see if any other assistance may be needed?”

How to ask if assistance is needed:

“So, how are you doing today? How have things been for you over the past year?”

“I see we have remitted your dues for some time and wonder if more is needed? For example meal preparation/food, transportation to the grocery store or doctors visits, home repairs or yard work, meeting your monthly expenses, etc.”

“I wonder if our lodge can provide you with home visits? Have you been getting out or is someone checking on you? If not, would you like someone from the Lodge to come by?”

“Are you aware of the Masonic support programs and services available to you? May I send you some of this information? If so, may I follow-up with you to see if you have any questions? May we pay you a visit to share this information with you?”

“Are you receiving the Trestleboard monthly? Would you rather receive it via email or snail mail? Let me confirm your email/mailing address...”

“Would you like to attend a stated meeting or join us for dinner at the lodge? Can we pick you up?”

“If I can’t reach you, is there someone else I can contact- a neighbor, child, trusted family member or friend? It’s nice for the lodge to have additional contact information in case we can’t reach you or should you need assistance, then we know who we can reach out to?”

***If a member refuses assistance, and it’s clear that assistance is needed, the lodge leader can say something like,**

“I am obligated to provide you relief and you are not allowing me to fulfill my fraternal obligation.”

“Please know that Masonic Assistance will allow you to continue to fulfill your family obligation and meet your needs/the needs of your wife and yourself. This is afforded to you as a qualified CA Mason and a benefit you should be proud of.”



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Ending the call:

“Well, it has been nice talking with you and I will be following up with you on DATE/in a week/next month, if that is okay?”

“In the meantime, do you have my contact information in case you need anything? You know you can call me anytime, right?”

“In the meantime, should you have any question about the Masonic Assistance programs, do you have the phone number and email address for Masonic Assistance? 888-466-3642 and intake@mhcuc.org.”

“Well, I need to call some of the other brothers. You have a great day. And, thank you for taking my call.”

“I look forward to visiting with you on DATE....”



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