



## **Grand Lodge of Michigan Six Steps to Initiation**

*A Guide to the Candidate Selection Process*  
**2015**

This document can 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.

You are encouraged to use the 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 can 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 consist 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 the 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 (First Meeting)**

*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 meeting?  Yes  No
- Provide the prospect with the handout "Address to the Brethren"

**Step Three (Second Meeting)**

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

- Did the candidate 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 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
- Inform the prospect to choose an item of interest to discuss at your next meeting.

**Step Four (Third Meeting)**

*Refer to the Guideline notes for a suggested approach on how to conduct this meeting. You should have more than one brother attend this meeting. Enlarge the prospects knowledge of brethren.*

Was a topic of interest from the Grand Lodge selected and discussed:  Yes  No

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Did another brother attend?  Yes  No

**Step Five (Fourth Meeting)**

*Refer to the guideline notes for a suggest approach at these meetings.*

Major lodge social event attended  Game Night  Picnic

Meeting night evening festive board  Holiday Party  Other

Any feedback from the brethren of the lodge?: \_\_\_\_\_

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**Step Six**

*Refer to the guideline notes for suggested communication at this step.*

Are both sponsors prepared to sign the petition?  Yes  No

If no, is further time recommend?

Yes  No - not a good match

Yes  No

Petition presented to lodge secretary?

Date: \_\_\_\_\_ | \_\_\_\_\_ | 20 \_\_\_\_

Any additional information?:

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## Suggested Questions

### *Step One – 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, sometimes they think they are going to learn all kinds of secrets but they never do. If your interest is one of curiosity I can answer your questions over the phone right now, 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: Just curious

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 time for and place for a 45 minute meeting, in a public place, preferably the lodge.

### *Step Two – 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 questions 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. Provide him with his own copies of page 7 and 8.

Explain each of the important points found in the Address to the Brethren handout 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 Three – The Second Meeting.**

Q: *Did the candidate read the lecture “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 no, why is it no?) 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 hand-out has a brief description of some of what we will talk about.

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. Find an item of interest on the internet, and bring it with you for our next meeting. We’ll talk about it then. It can be historical, spiritual, or any topic about Freemasonry.

Do you have any problems with this?  Yes  No

**Step Four – 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 webpage and choose a topic for brief discussion today?  Yes  No

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 may cost some money. Everybody pays.

Also encourage the candidate to attend two lodge meetings for the social festive board 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 Five – 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 Six – The Petition***

How did he enjoy the social event or events? Make sure you meet him socially at least three times so that you and he 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 spouse (other) at your home
- Committee makes their report to the members of the lodge
- The members then vote on your acceptance into the lodge. Vote must be unanimous.
- If favorable, you will receive a letter from the lodge secretary asking you to attend on a specific date in order to be initiated into Freemasonry. You will be contacted by your Mentor to update you as to this new chapter in your Masonic life.



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Second Meeting Hand-out  
Provide a copy for the Prospect

Please bring with you to our 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 a another Freemason. They were either a family member, a long time friend, a workmate or 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 you, 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 this 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** (provide the prospect with copy of the "Information you need to know" at this time)

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 spend your valuable time and money, rather than after. These points are a first step in helping 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 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 this lodge when it 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 per month, sickness, emergencies, family or work obligations excepted.  
*Are you okay with these expectations?*  Yes  No
5. Freemasonry costs money. There will be an initiation fee of \$ \_\_\_\_\_. Generally this is spread over the three degrees in some fashion. There are also annual dues that must be paid by the first of January of 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 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
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 phrases and ceremonies to memory and to repeat them from memory to the lodge.

*Are you comfortable with this requirement?*  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 seek further knowledge and involvement.

*Are you comfortable with this understanding?*  Yes  No

My contact information is:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_