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**Members’ Pathway Charter Lodge Scheme**

**Guidance for Lodges**

**Overview**

The Members’ Pathway Charter LodgeScheme has been developed to support Lodges to integrate the principles and guidance of the Members’ Pathway into their everyday Lodge practices.

**Aims**

The Members’ Pathway Charter Lodge Scheme aims to ensure that:

* The process of placing Members’ Pathway Candidates is transparent
* Members’ Pathway candidates are placed in Lodges where they will be assured of an outstanding masonic experience
* New members are properly supported to develop at an appropriate pace and assisted in their masonic journey
* Lodges are supported to develop plans to assure their long-term future
* Prospective candidates applying to join Freemasonry through the Members’ Pathway, have all the information they need to make an informed decision about which Lodge they would like to join

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**Scheme Application Process**

The *Members’ Pathway Charter Lodge* scheme is in three sections. Section 1 and 2 of the application can be completed by the Lodge (F&GP) Committee or a task and finish group setup for this purpose, but Part 3 is a collaborative process which all Lodge Members must be invited to participate in. This could be done in open Lodge or at a specially convened meeting but irrespective of the meeting format, the involvement of all Lodge members is an essential component of the exercise.

The process overall should be coordinated by the Lodge Membership Officer and Lodge Mentor who must be involved in each of the three parts of the scheme application.

The three sections of the scheme are:

**Section 1** Statements of Good Practice *(15 minutes)*

**Section 2** Lodge Succession Plan *(15 minutes)*

**Section 3** Lodge Profile and Plan *(at least 30 minutes)*

The documentation to complete the scheme application are available as three word documents saved as appendices and referenced in the guidance herein. The documents are in Microsoft Word format and should be completed in Word and not handwritten. The appendices are live documents, so when you type into the relevant sections, that the formatting and layout will change – do not worry about this. The three documents are also setup so you can only edit the relevant sections (i.e. the sections that you are required to fill in).

When you have completed each section as detailed in the guidance herein, please email the 3 completed documents in Word format to **pathway@pgln.org.uk**. It would be helpful if you could save the each document using the following format: *Charter Lodge Application Document [INSERT NUMBER] for [INSERT LODGE NAME and NUMBER].*

Following submission of your application, it will be reviewed by the Provincial Members’ Pathway Team who might come back with questions or points of clarity.

The scheme will be open for applications from September to December each year and Lodges will be asked to update their application annually to maintain their Charter Mark if they wish to retain their Members’ Pathway Charter Mark.

On successful submission of scheme applications which meet the requirements detailed herein, the Lodge Secretary will be sent a digital copy of the Members’ Pathway Charter Lodge Charter Mark, along with guidance for its use.

**The Provincial Grand Membership Officer and the Provincial Grand Mentor are available to support with the process or answer any questions your Lodge might have about the scheme. Their contact details are below:**

|  |  |
| --- | --- |
| **Provincial Grand Membership Officer** | **Provincial Grand Mentor** |
| W Bro Gary Breach | W Bro David Stockdale |
| gary.breach@pgln.org.uk | david.stockdale@pgln.org.uk |
| 07920 461 930 | 07715 410 765 |

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**Requirements to become a Members’ Pathway Charter Lodge**

Applications are not graded or marked in anyway and the scheme application is effectively a self-assessment process.

Lodges will be awarded the Charter Mark if they meet the requirements of each part of the scheme application. Those requirements are:

* **Section One**: The Lodge meets, or plans to meet, all the statements of good practice
* **Section Two**: The Lodge Succession Plan demonstrates that the Lodge has a healthy pipeline of officers progressing up the ladder each year and new members will not be required to take office immediately to fill gaps
* **Section Three**: The Members of the Lodge collaborate to create a robust Lodge Profile including examples of the Lodge’s own good practice and ideas for the future.

It is acknowledged that not all Lodges are in the position to meet all the requirements of the Charter Mark Scheme, but all Lodges are nonetheless encouraged to work through the application process. Lodges not meeting the requirements of the Members’ Pathway Charter Lodge scheme should use the application as a development tool which will serve to assist the Lodge in identifying areas for improvement or requiring attention.

In the event that your Lodge does not meet all of the requirements of the Members’ Pathway Charter Lodge scheme, then please get in touch with the Provincial Members’ Pathway Team, who will arrange to meet with the Lodge Officers and support the Lodge with a plan to work towards meeting the requirements of the Charter Mark.

You can contact the Provincial Members’ Pathway Team at **pathway@pgln.org,uk** or directly contact both the Provincial Grand Membership Officer and the Provincial Grand Mentor using their contact details on page 3.

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**Section 1 Guidance | Statements of Good Practice**

**Please read through the Section 1 Guidance before completed *Appendix 1 Members’ Pathway Charter Lodge Statements of Good Practice.***

The Members’ Pathway Charter Lodge Statements of Good Practice describe positive Lodge practices and activities which underpin the principles of the Members’ Pathway. These Statements of Good Practice are things that a Lodge should be doing to attract and engage new members and to support existing members to maximise their enjoyment of Freemasonry. The Statements of Good Practice are also a useful planning tool that Lodges can use to identify things they might need to work on to attract and engage members.

It is anticipated that most Lodges will complete Section 1 (and Section 2) in a meeting of the Lodge (F&GP) Committee or an informal task and finish group setup for this purpose. However, if Lodges choose to do all 3 sections together, then involving all members in Section 1 (and 2) is not an issue. Irrespective of how the Lodge chooses to complete Section 1, the Lodge Membership Officer and Lodge Mentor must be involved and should lead on coordinating and completing this section.

Section 1 is split into 3 areas – 1) *The Lodge*; 2) *The Lodge Membership Officer*; and 3) *The Lodge Mentor*. Each area lists positive Lodge practices that you should read and indicate against each by checking the box if the Lodge has **Met** or **Not Yet Met** each statement.

Against each statement **Not Yet Met**, the Lodge must provide details of what it plans to do to meet the corresponding example of good practice detailing plans in a brief narrative in the adjacent comment box.

It is recognised that some Lodges will be doing things that achieve the same outcome as some of the statement of good practice, but not necessarily in the same way. In this scenario, Lodges are encouraged to consider the essence of the outcome the statement of good practice would achieve if implemented, and mark the statement as Met with a brief explanation in the corresponding comment box about what the Lodge does to achieve the outcome in its own way – these comments could be used to refine the process in future or to share examples of good practice across the Province.

Like all sections of the scheme application, Section 1 is not scored, and it is recognised that some of the examples of good practice described will be work in progress.

**To meet the requirements of Section 1 for the purposes of recognition as a Members’ Pathway Charter Lodge, the scheme requires that Lodges are meeting, or have an achievable plan to meet, each of the statements of good practice.**

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**Part 2 Guidance | Lodge Succession Plan**

**Please read through the Section 2 Guidance before completed *Appendix 2 Lodge Succession Plan.***

The Lodge Succession Plan is used to plan for the rotation and succession of available Lodge Members into key roles. In a Lodge it is used to identify members who are interested in certain offices and to ensure that the Lodge does not become over dependent on a few (or its new) members.

Rotating members between offices involves more members in the running of the Lodge. This tends to maintain interest and increase involvement and commitment. It also helps members develop a wider range of skills and ensures that the Lodge does not become over dependent on a small number of members.

Like Section 1, the process of compiling a Lodge Succession Plan can be completed by the Lodge (F&GP) Committee or a Task and Finish Group setup for this purpose.

The Lodge Succession Plan invites the Lodge to consider who will occupy the progressive and principal offices over the 5 years from the next installation meeting. The name of the Lodge Member who will occupy each office should be typed into the table and if there is more than one possible name, you can add both (or more). The Lodge Succession Plan is a living document, which should be updated each year and it is recognised that it is likely there could be changes to the plan in future.

**The scheme requires that the Lodge can demonstrate through their Lodge Succession Plan that the Lodge has a healthy pipeline of officers progressing up the ladder each year and that any new members will not be required to take office immediately to fill gaps.**

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**Part 3 Guidance | Lodge Profile**

**Please read through the Section 3 Guidance before completed *Appendix 3 Lodge Profile.***

The Lodge Profile is a tool assist Lodges to reflect on the things they do well and want to build on, and the things they do not do so well and want to improve. The Lodge Profile will be used by the Members’ Pathway Team to match unsupported potential candidates who directly apply to join Freemasonry, with Lodges best suited to their needs.

The Members’ Pathway Team will also use the relevant information in the Lodge Profile to develop a Lodge Profile Document that could be shared with prospective candidates who apply to join Freemasonry through the Members’ Pathway who will use the Lodge Profiles to make an informed choice about which Lodge they would like to join. Consequently, making sure your Lodge Profile is as detailed and robust as possible will be advantageous.

The Lodge Profile invites Lodge members to reflect on the things their Lodge does well and identify opportunities which will allow the Lodge to consider how they might build on those things to support the aims of the Members’ Pathway. The Lodge Plan will also ask Lodge Members to reflect on areas that need improvement and consider what could be done to plan for those improvements in the future.

The information in the Lodge Profile will also be to assist the Provincial Executive to identify specific support that Lodges might need to ensure a successful long-term future. The Lodge Plan will also be useful to identify good practice across the Province that could be shared with other Lodges or used to refine the Statements of Good Practice (Section 1).

The Lodge Profile should be developed as a collaborative effort involving all members of the Lodge. It is up to the Lodge how this is done but if it is done in open Lodge, it would be better if no visitors were present, so that members can speak freely.

At the start of the process of completing the Lodge Profile, the Lodge Membership Officer and Lodge Mentor should explain to the members present that their full participation in an open and honest discussion is vital to ensuring the outcome is useful. Either the Lodge Membership Officer or Lodge Mentor should lead the discussion with the other taking responsibility for completing the Lodge Profile document (Appendix 3). If the Membership Officer and Mentor is the same person, then he should identify someone else to complete the form in advance of the meeting. Practically, the Lodge will need to use a Laptop Computer in the meeting to fill in the document (Appendix 3) in real time, and arrangements for this should be sorted out in advance of the meeting.

The Lodge should work through each question and all members present should be encouraged to input into the process. The document (Appendix 3) is effectively a questionnaire presented as a series of open questions to encourage discussion. Guidance or prompts against each question (where required) are in *italics*. On completion of Section 3, the document should be shared with all members to check that it is an accurate reflection of the discussion and to give those members who could not be present, an opportunity to comment. It is recognised that some of the questions might invoke a debate which will not necessarily lead to a unanimous outcome – it is up to the Lodge how this is recorded but we encourage the Lodge to respect and consider the views of the minority as well as the majority.

**The scheme requires that the Lodge works collaboratively with all its members in an open forum to complete a reflective and robust Lodge Profile, including ideas for future development in key areas.**

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