

To: Lodge Leaders

From: Sabrina Montes, Director of Masonic Outreach Services

Subject: Outreach to Members with Remitted Dues

Every year, California lodges provide financial relief to members in need by remitting their membership dues. Oftentimes, the members whose dues are remitted are vulnerable and may need additional support through Masonic Outreach Services.

In order to ensure that members in need receive necessary support, please use the enclosed resources to help evaluate members' well-being when your Charity Committee reviews its annual list of members with remitted dues. These materials are designed to help you contact each member and more fully understand the depth of their financial or other needs.

All of the resources below can be found on the Masonic Homes website (masonichome.org) under Education and Resources in the Lodge Resources section.

How to Reach Out to Members with Remitted Dues

This document provides an overview of how to reach out to members with remitted dues, even if they are out of state.

Phone Script – Reaching Out to Members with Remitted Dues

This document is designed to help walk you through a conversation with a member whose dues have been remitted, including the key points to focus on. We suggest that you become familiar with this document before calling members to help you caller understand how to respond to a variety of situations that the member or their spouse may be facing. Keep in mind that this is only a guide – you should feel free to use words and phrasing that is natural to your communication style.

Remitted Dues Call Log

Use this document to track which members have been contacted, the outcome of the call, and whether any follow up is required (such as a visit, call to Masonic Assistance, sending information, calling an adult child, etc.). The last two columns can help you track any changes in status over time.

Home Visit Checklist:

This checklist provides details about what to focus on when visiting a member's home. We suggest you become familiar with the items in this list before arriving so you'll know what to look for and any questions to ask the member/widow. Please complete the form after the visit, as completing it while at the members house may be uncomfortable or invasive. The purpose of this form is to capture your observations and anything you have learned.

Home Visit Form

This form should ONLY be completed if there is a need for assistance, and provides guidance if a lodge calls Masonic Assistance about a member in need. It can be used to document the results of a home visit or a conversation held with a Mason, wife, or widow. The person completing the form will explain the member's need, how the lodge will be able to assist, and what Masonic Assistance services may be needed.

Member Benefits Overview

This document provides a brief yet comprehensive summary of the resources available to members through Masonic Assistance.

Additional Support

If you have questions regarding any of the above, or need guidance to help a member in need, visit masonichome.org, Masonic Assistance at (888) 466-3642 (Monday-Friday, 9 a.m. – 4 p.m.), or email masonicassistance@mhcc.org.