

Set it up

Complete this before invitations. Carry these names and dates into the call script and worksheet.

Setup item	Name, location or date
Lodge / approval / announcement dates	
Coordinator / contact	
Backup / callers (identify officers)	
Two reviewers (coordinator may be one)	
Private storage: records / code list	
Serious concern contact / alternative	
Jurisdiction checks completed / by whom	
Invitations begin / last response due	
First summary due / correction deadline	
Test review date (or date to decide it)	
Destroy notes, sheets and code list by	
Consent-contact list: custodian / delete by	

Assign codes; keep names separate

Use R01, R02 and so on, assigned in shuffled order. The coordinator's call sheet links code and name; each caller gets only his assigned contacts. Records and member worksheets use the code, never a name. A code is linkable, not anonymous. Never guess who wrote an uncoded sheet.

Prepare the same information for both routes

Give callers and written participants the same next three months of lodge dates and the same date range for question 7. Fill in the privacy panel on page 15 before handing out the worksheet. Name any person who will actually see returned sheets; use sealed returns to a named reviewer.

Print what you need

Caller guide: pages 5-8; print 7-8 as their own two-sided sheet. Record: page 9, one per respondent. Private call sheet: page 10, copies as needed. Member worksheet: pages 15-17, keep together; page 17 is optional. Coordinator forms: pages 4, 12-14 and 19. Separate printable packs contain the same pages and retain these booklet page numbers.

What he said

Private response record. Code only; names and permissions belong on page 10.

Code _____ Date _____ Caller initials _____ ☐ Officer caller

Source: ☐ Call ☐ Written ☐ Both Status: ☐ C complete call ☐ P partial call ☐ W written only

S = skipped; NA = not asked; a blank = missing. Record one brother once. For unlinked writing, use a separate sheet ID prefixed U and do not treat it as a unique brother.

1. Membership experience

2. A time connected or on the outside (omit identifying details)

3. Keep doing

4. The one change

5. What gets in the way (mark if prompted)

6. Wants (one, or write his own answer)

☐ A regular part ☐ Now and then ☐ Kept in the loop ☐ Nothing right now ☐ Not sure

Other / S / NA: _____

7. Can make in the next three months

☐ None ☐ One thing ☐ Two or three ☐ Four or more ☐ Cannot predict

Guess: ☐ Firm ☐ Rough ☐ Cannot say Dates read / supplied: _____

What would make it easier / trip worth making

8. Staying connected: up to two; Nothing stands alone

☐ Call ☐ Text ☐ Email ☐ Printed newsletter ☐ Short video ☐ Nothing

Frequency / other / S / NA: _____

9. Participation in the past year (one)

☐ Not at all ☐ Once or twice ☐ A few times ☐ About half the time ☐ Nearly every time

Read-back corrections / uncertainty / S or NA not recorded above

Do not copy sensitive allegations or names here. If more space is needed, attach a blank page with the same code and question number. The code still links to a person; keep this record secure.

Call sheet and permissions

Private. Coordinator's full copy; each caller receives only his assigned contacts.

Keep apart from responses. Return caller copies at the end of the round. Destroy all copies by the setup date. Move only explicit, still-needed contact permissions to a separate minimal contact list before destruction; do not carry response codes or themes onto that list.

Planning group, one only: O = current officer. Among everyone else: R = most meetings; C = some in the past year; A = none in the past year; U = unknown. These are outreach estimates; question 9 is the member's own account.

Outcome, one only: C = all nine call questions offered; P = partial call; W = written only; D = declined; NR = no linked reply after two attempts. Leave pending blank. A caller who also writes remains C or P; mark Written also. S = summary: E email, P paper, C call, N no. Permission must be explicit.

Contact 1	Permissions dated _____
Code _____ Group _____	Brother _____
Caller _____	Contact _____
Attempt 1 _____	Attempt 2 _____ Appointment _____
Outcome ____ Written also ☐	Summary E / P / C / N ____ Sent _____
Test callback: Yes / No	Named caller _____ By _____
Ongoing contact: Yes / No	Channel / frequency _____

Contact 2	Permissions dated _____
Code _____ Group _____	Brother _____
Caller _____	Contact _____
Attempt 1 _____	Attempt 2 _____ Appointment _____
Outcome ____ Written also ☐	Summary E / P / C / N ____ Sent _____
Test callback: Yes / No	Named caller _____ By _____
Ongoing contact: Yes / No	Channel / frequency _____

Contact 3	Permissions dated _____
Code _____ Group _____	Brother _____
Caller _____	Contact _____
Attempt 1 _____	Attempt 2 _____ Appointment _____
Outcome ____ Written also ☐	Summary E / P / C / N ____ Sent _____
Test callback: Yes / No	Named caller _____ By _____
Ongoing contact: Yes / No	Channel / frequency _____

No recorded permission means no permission. Confirm a safe contact method; do not send a sensitive subject line or voicemail. Members may change or withdraw contact permission through the coordinator.

What we heard

Private working sheet. Use one per theme; the lodge receives only the screened summary on page 14.

Theme, in plain words

What the records actually support (paraphrase; omit identifying details)

Assigned respondent codes supporting this theme (each code once)

Unique coded respondents for this theme: _____

Separate unlinked sheet IDs / observations (do not add to brother count)

Different views, uncertainty, or evidence that does not fit

Strength to preserve / possible action to investigate

Whose experience may be missing

Privacy review: ☐ safe to summarize ☐ broaden / omit detail ☐ omit from group report

Why this wording is safe, or what must be removed

Reviewer 1 _____ Reviewer 2 _____ Date _____

A count is not permission to disclose

Do not publish names, codes, quotes, diagnoses, unique incidents, or combinations that point to a person. Suppress theme counts of 1-4. Even five or more is not automatically safe. Omit a recognizable theme rather than disguising it with "a few." See page 14.

Choose one small test

Use a separate review date. The first listening summary does not have to wait for the test.

Choose one feasible change or one strength to protect. Check it through the lodge's normal approval process. With explicit permission, the named caller may make one invitation about the specific test before the agreed date. Do not reveal who raised a theme. Everyone else receives the ordinary lodge invitation.

Theme this answers / evidence and uncertainty

Test: what happens, for whom, and for how long

Owner / backup / approval needed and obtained

Money cap / hours cap / what makes room for the work

Baseline or starting condition / how it will be observed

Success criterion / stop or change rule, agreed before starting

Start date / review date / person reporting the result

After review: keep, change, or stop, and why

Example: test the practical barrier

Hypothetical example: transport was raised as a barrier. Offer a ride arrangement for three stated meetings. A willing owner and backup arrange drivers and check practical requirements. Set a small fuel cap and a time cap; do not assume rides cost nothing. First record whether a ride arrangement exists and how many requests it currently serves. Track requests and completed rides privately. At review, success means requested rides were reliably provided and riders who choose to comment found them useful. Stop or revise if no driver is available or limits are exceeded. Attendance may be noted, but a small trial cannot prove the rides caused a change.

The test may run for three monthly meetings or another stated period. Announce its actual review date in the first summary. If no suitable test is approved, say why and give the next decision date.

Report back

Keep the promised date. Send the screened summary through the agreed member channels.

Draft: We invited _____ brothers during _____. We heard from _____ unique coded respondents. [Include overall counts only if safe.] Our response was mostly from _____, so we still do not know _____. Unlinked written observations were considered separately; they were not added to the respondent count.

Strengths to keep / changes worth considering (paraphrase safely)

Different views and what we still do not know

What we will try, owner, start and review date - or what is still being decided

What we are not doing yet, and why / next update / correction contact

Screen the summary before anyone sees it

Both reviewers check it. No names, respondent codes, verbatim quotes, unique incidents, diagnoses, or identifiable combinations. Do not link a theme to an attendance group, officer role, age, location, or other clue. Keep detailed response-route and group counts private.

Suppress theme counts of 1-4. Do not replace them with “one man” or a revealing description. Broad wording such as “some responses” is acceptable only when the theme itself is not recognizable; otherwise omit it. Counts of five or more still require judgment. Check whether subtraction from a total or another count would reveal a small group. Suppress those totals or comparisons too.

Invented example - adapt only to what your evidence supports

“We invited the membership to tell us what lodge life has been like. Most of the responses came from brothers we see regularly; we still need to hear more from those we seldom see. Fellowship matters. The responses also gave us practical questions about access and scheduling. We will first check what a ride arrangement would require and report a decision on [date]. If we proceed, we will review it after three meetings and announce that date. These are the views of those who answered, not a vote or a promise of attendance. Please send corrections to [contact] by [date].”

A private serious concern follows the agreed route even if it cannot safely appear here. Before destruction, correct errors raised by the stated deadline. Give the test result its own brief update.

Reconcile and tally

Private coordinator sheet. Copy the optional tally for coded and unlinked responses separately.

Invited ____ C complete call ____ P partial call ____ W written only ____

Unique respondents = C + P + W = ____ Declined ____ No reply ____ Pending ____

C and P include men who also wrote. D and NR apply only to men with no linked response. For this round, invited = C + P + W + D + NR + pending. Late or unsolicited coded responses must be identified separately before making that comparison. Unlinked sheet sets received ____; never add them to unique respondents. Their writers may still appear as NR because identity is unknown.

Planning groups among unique respondents: O ____ R ____ C ____ A ____ U ____

Total must equal unique respondents. Use page 10 definitions; keep this breakdown private.

Among coded respondents answering both Q6 and Q7: total ____; want a regular/now-and-then part ____; of those, can make at least one ____ / none ____ / cannot predict _____. These last three counts must sum to the wants count. Other, skipped and missing answers excluded: _____.

Optional A: one tally per source group

This copy: ☐ Coded written respondents ☐ Unlinked sheet sets

Base ____ = all written responses in this group, including sets without page 3. Count each coded respondent once, even if he also had a call. Blank includes an omitted optional page.

Item	1	2	3	4	5	N	Blank	Unclear
A1. I feel welcome when I take part.								
A2. There is a brother here, whom I know through the lodge, I could call for help.								
A3. When I offer something here, it gets used.								
A4. I get chances to learn something that matters to me.								
A5. The time I give the lodge feels worth it.								

Each row must sum to Base. Unclear = multiple or uninterpretable marks. Do not replace N, blank, or unclear with zero; do not create a combined score.

Optional B: one tally per source group

Use the same Base as A. Valid B responses ____; blank ____; unclear/too many ____.

These three must sum to Base. A valid response has one or two choices; Nothing right now or Not sure must stand alone. Do not choose among excess marks yourself.

Fellowship ____ Education ____ Degree work ____ Service ____ Mentoring ____

Family ____ Other ____ Nothing right now ____ Not sure ____

Choice totals can exceed valid responses, up to twice that count. Keep Other text privately and report only safely. Do not pool these answers with a phone question or combine coded and unlinked counts.

Checks completed by both reviewers / unresolved discrepancies
