

Prepare the session

Purpose

Prepare willing callers to listen consistently, protect responses and report back.

What to bring

Guide pages 4-10 and 12-14; all three member-worksheet pages; the seven-page coordinator pack; the same next-three-month lodge calendar for everyone; blank practice paper. Use invented responses only in training.

People and preparation

Facilitator, coordinator, willing callers, backup and two named reviewers. The coordinator may be one reviewer. Before real invitations, complete the setup and privacy information, approved storage, serious-concern route, return route and destruction dates.

Choose the right setting

This is a 60-minute caller-training workshop. It is not a group survey or a replacement for private calls. Practise excerpts today; a real call uses the full guide. No recording or automated transcription. Take only fictional practice notes and discard them after training.

How to use this companion

Read SAY passages aloud or adapt them in your own voice. DO passages are facilitator instructions. Replace bracketed names and dates before use. Every scenario identified as fictional is practice material, not evidence about your lodge. The meeting on page 4 is a separate session, not extra time inside the workshop.

Keep the set together

Guide revision 4 is the matching source. Existing guide and forms remain the authority for the workflow. This companion adds practice and meeting structure; it does not replace permission records, privacy procedures or governing approvals.

Workshop script | opening

0-5 minutes | Set the purpose

SAY: "We are learning to ask what membership has been like, without defending the lodge or recruiting anyone. A man can decline, skip a question, write instead or ask for another caller. His wishes and his available time are different answers."

DO: Name the coordinator and reviewers. Ask each participant to name one habit that could get in the way of listening. Write habits, not member names.

5-12 minutes | Rehearse the opening

SAY: "Use the opening on guide page 7 with our actual names and dates. Say who can read the notes. This is confidential, not anonymous; a small lodge may recognize a story even without a name. We promise a report by a date, not a particular fix."

DO: Read the completed opening aloud. Check that caller, written worksheet and coordinator setup name the same people and dates. If they do not, stop and reconcile them before invitations.

12-20 minutes | Model neutral listening

SAY: "What has being a member here been like for you?" After the answer: "Tell me more." Then: "What should the lodge keep doing?"

DO: Use this fictional reply: "I like the conversation, but my work schedule keeps changing." Demonstrate silence, a neutral follow-up and a short read-back. Invite observers to identify any leading question or promise they heard.

Workshop script | practice and close

20-35 minutes | Practise in threes

SAY: "The caller asks; the respondent uses the fictional situation; the observer watches for listening. Nobody shares an actual grievance for this exercise."

DO: Run three five-minute rounds, rotating roles. Each round: three minutes of practice and two minutes of feedback. Use Q1, Q5, Q6 and Q7 exactly as printed. Fictional respondent: wants a regular part, but can realistically make no events this quarter because of shifts. Do not turn that into 'not interested.' This shortened practice does not replace all nine questions in real calls.

35-45 minutes | Record without inventing

SAY: "What did he actually say? What are we adding? S means skipped; NA means not asked. A blank is missing information. The same man who calls and writes is still one respondent."

DO: Complete one practice call record under a fictional code. Read it back and correct it. Ask what to do with an uncoded written sheet: keep it separate; never guess the writer or add it to the unique respondent total.

45-55 minutes | Protect the report

SAY: "Officers receive a screened summary, not our raw notes. Both reviewers check it. Remove identifying stories and combinations. Suppress theme counts of one to four; five or more is not automatically safe."

DO: Reject this fictional summary: "The one night-shift officer wants rides." It identifies a person. Practise a safe paraphrase only if the theme cannot identify anyone; otherwise omit it. A serious concern follows the separate agreed route, not a public theme discussion.

55-60 minutes | Agree the next step

SAY: "Who is willing to do what, within what time? We will send one reminder at most after the first unsolicited invitation and stop if he declines. Our summary date is [date], even if the next action is still being decided."

DO: Record accepted caller assignments privately. Plan roughly one contact hour per planned participant, plus setup, review and reporting time. Read back the report date, correction deadline and next coordinator check. Destroy fictional practice notes.

Sample 30-minute listening-results meeting

Before the meeting

Use after the listening round. Circulate only the summary screened by both reviewers. The chair follows normal lodge procedure; this working agenda does not create voting authority.

0-3 minutes | Chair states the purpose and privacy boundary

Discuss themes, not who might have said what.

3-8 minutes | Coordinator presents what was heard and what remains unknown

State voluntary/partial coverage; these responses are not a representative vote.

8-15 minutes | Members ask clarifying questions

Recorder captures uncertainties and corrections, never raw accounts or suspected identities.

15-23 minutes | Choose one proportionate test or further investigation

Use Choose one small test: willing owner, backup, money and hours caps, starting condition, success criterion, stop rule and review date.

23-28 minutes | Check authority and capacity

Record approval obtained or the route still required. No answer to a survey volunteers anyone.

28-30 minutes | Read back the decision and next update

Use Report back; name a correction contact and date.

Closing words

SAY: "We heard enough to try [action], within [limits], with [willing owner]. We do not yet know [uncertainty]. We will report the result on [date]. If approval is still pending, we will report that decision instead."

After the meeting

Within two working days, send the agreed screened update through the promised channels. Keep the test review separate from the initial summary date. Retain and destroy source records according to the setup plan; do not attach them to meeting minutes.