

*Planning.
The first step
to the future.*

A Masonic Leader's Planning Guide

for Masonic Lodges and
Other Masonic Organizations



Seven Steps to Developing a Working Plan and Budget



Produced by
The Masonic Renewal Committee of
North America, Inc.

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Masonic
Renewal
Committee
of North
America

Seven Steps to Developing an Annual Plan and Budget for Your Masonic Organization

The essential skills the leadership of a Masonic lodge or any Masonic organization needs to know to develop a professional, workable annual plan and budget.

Each step builds upon the skills developed in the prior steps. The results are twofold: your Masonic organization will have an annual plan and budget, and Masonic leaders will learn the skills needed to continue the planning process for years to come.



Produced by
The Masonic Renewal Committee of
North America, Inc.

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Table of Contents

<i>Introduction</i>	4
<i>Getting Organized to Plan</i>	6
<i>Defining Goals and Objectives</i>	8
Step 1: Identifying Problems or Needs	12
Step 2: Establishing Priorities	16
Step 3: Setting a Specific Goal for Each Priority	22
Step 4: Selecting the Best Methods to Achieve Each Goal	28
Step 5: Identifying Resources and Creating the Will to Work	32
Step 6: Building a Budget to Support Your Plan	36
Step 7: Monitoring, Evaluating and Reviewing Your Progress	40
<i>Appendix A: Blueprint 2000</i>	44
<i>Appendix B: A Case of the Chicken and the Egg</i>	46
<i>Other Sources of Information</i>	48

Planning and Leadership

Of all the functions Masons should associate with the leadership and management of the lodge, planning should be right at the top. "The Master of the lodge is responsible for planning," Masons proclaim. "It's his job to establish the goals for the year and to put a plan together."

Planning is a skill leaders and managers of any organization need to acquire. It is a skill that can be taught and is usually one of the first skills included in a professional training curriculum.

Planning is one important skill, but it is not the only one. Leaders should have a compelling idea of where the organization needs to go, what type of members it will attract, what benefits it can provide, and how the organization needs to be perceived in the community if it is to thrive.

Masonic leaders also have other duties related to degree work, visitations, communications, special events and the day-to-day business of the organization.

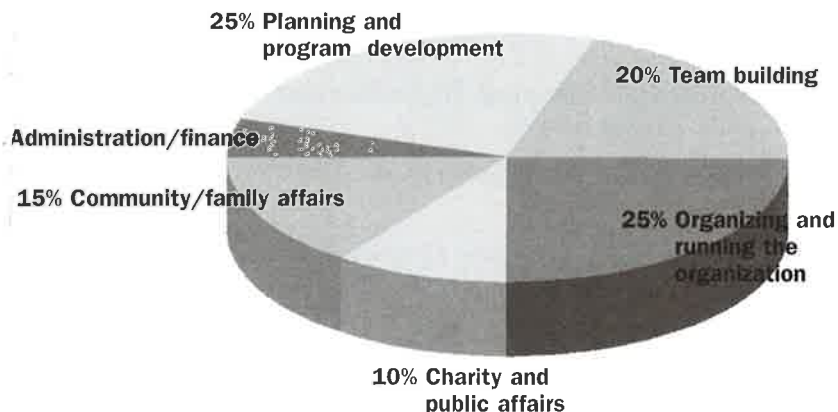
When the Masonic leader becomes competent in each of these important duties, and develops skills in planning for his organization, the result can be an exciting, vigorous and involved organization characterized by high energy, good fellowship, increased involvement and a growing, empowered membership.

What Should Leaders Do?

Of all the skills associated with great leaders, what's on the list of top ten behaviors? Consider the following. How often will your planning skills be needed?

1. Ensure the relevance of the organization.
2. Develop a powerful vision and goals for the future of the organization.
3. Develop a strategy or means of getting from the present to the future.
4. Identify and empower others who can share in the vision.
5. Lead the organization through the process of change.
6. Create "fellowship" through example and trust.
7. Encourage advocates, work with opponents, eliminate adversaries.
8. Make more "right" decisions than "wrong."
9. Master yourself. Explore everything. Read widely what others are doing.
10. Focus your efforts on the current and future needs of your members – your stakeholders.

Are you doing these things for your lodge?



How the Leader Uses Time

Masonic leaders often ask, "How much time should I devote to planning?"

Good question. With all of the other tasks assigned to the Masonic leader, there is seldom time to spare. Here is a chart outlining how Masonic leaders who have been trained in the skills of leadership view the relative importance of their time and of planning. It's only a suggested model. See how close this is to how you use your time.

5. **Segment the planning process.** Consider dividing your planning team into smaller groups and ask each to develop a plan for its area of responsibility. You may increase the amount of coordination you will need to provide, but the quality of the work product will increase immeasurably (see suggestion 2, pg 6).
6. **Involve the members if you can.** The greater the participation by members in the planning process, the more involved members will be in implementing the plan. Keep in mind, however, that those participating need to be advocates and support the effort.
7. **Do not etch your ideas in stone.** You are likely to make a number of “mistakes” early in the process. The more you delegate, the more ideas you will receive. Keep an open mind to new ideas, but remember you may need time to adjust your plans as circumstances change.
8. **Be sure to provide ample time.** It will take longer than you think to develop a plan. There are many tasks and you will need help in bringing it all together. Allow up to eight weeks from the time the team is formed until the first good draft is completed.
9. **Start in the early Fall.** If your fiscal year begins in January, begin your planning process in September. An organizational meeting in early September means you will have your plan and budget ready by mid-December and implementation can begin early in January.
10. **Stay focused.** This closing hint is an important word of caution. Don’t let issues sidetrack your efforts. There’s too much at stake. Use an agenda, a calendar, specific tasks with deadlines, concrete objectives and a skilled facilitator to keep your group focused upon the tough issues you will be handling.

A Model Planning Team

There are many different ways your planning team may be organized. Here is a model for a lodge of about 100 members.

Planning Team Leader: Responsible for the development of the plan and for getting it approved in the lodge; may or may not facilitate the planning meetings; and may not be the Master of the lodge.

Communications Coordinator: Responsible for preparing all materials, minutes, correspondence and other products of the team.

Lodge Secretary: Responsible for membership records and other details related to the records of the lodge.

Lodge Treasurer: Responsible for preparing current and historic budget reports, detailed financial summaries and the inflow and outflow of lodge resources and savings.

Directors for Special Projects: Responsible for the development of individual product plans in key result areas identified by the team. Director status should be given to the following areas:

Family involvement

Community relations

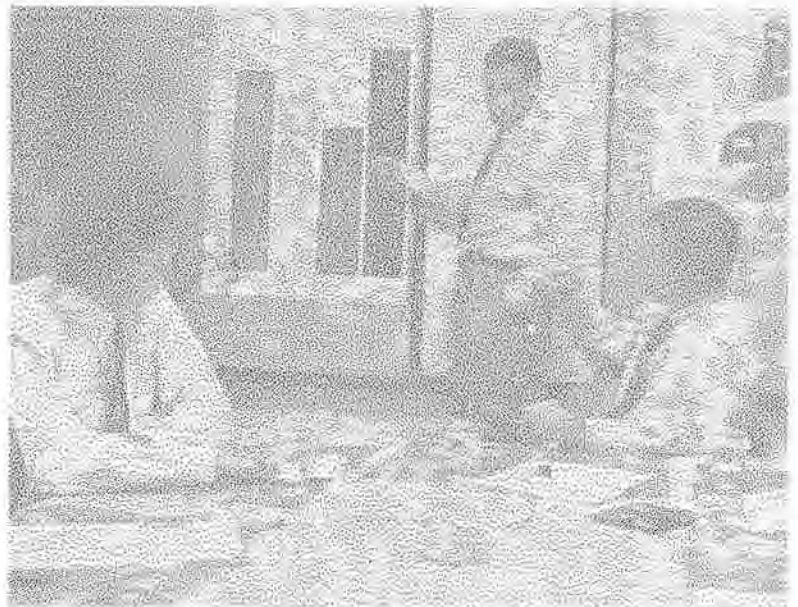
Public awareness

Membership development

Finance/accounting

Facilities management

Fraternal affairs/lodge fellowship



Once you have developed your planning team’s duties and responsibilities, complete a profile for each member using **Planning Worksheet #1** as an example.

Successful Planning Begins With Goal Setting

Planning Solves Problems or Creates Opportunities

We have suggested that leaders must be responsible for the future well-being of the organization. As such, they must define the problems and expectations of the organization and its members.

Where there are problems, leaders are responsible for solutions. Where there are opportunities, leaders are responsible for maximizing them. Planning consists of organized methods or tactics to do both. This Guide is designed to provide solutions through planning for a Masonic lodge.

Establishing Annual or Short-Term Goals

A successful plan begins with established short-term goals. If you have divided the planning effort into teams, each team will develop its own set of goals. Collectively, these become the goals for the lodge.

For example, a Masonic lodge may strive to become the preferred choice of men in the community. That's a really important goal. Other lodges may want to double their involvement in the community or increase involvement with the family. Some simply want to not waste time. Others want better ritual, better attendance, increased relevance and more younger men.

Developing Realistic Goals

Goals are directly related to the needs of the organization. If a lodge or Masonic organization really tried to fix all of its needs in a single year, the process could be very frustrating. For that reason, a limited number of goals, all of which contribute to a longer-range vision, will be more helpful. Here is a list of goals for a Masonic lodge whose vision is to be preeminent. See how many could serve the planning effort in your organization. After you review this list, follow the directions on **Planning Worksheet #2**.

To attract and retain more youthful, professional men to the lodge.

To rekindle the interest and activity of existing members.

To become more involved with kids.

To increase the interest and support of our Masonic families.

To increase interest and support from the appendant bodies.

To increase the financial resources of the organization.

To have active, interesting and exciting meetings.

To make a better impression on younger members.

To maintain better records on and communications with all members.

Looking at a Planning Effort Gone Astray

Those involved in the planning effort who are inexperienced in this important leadership skill can mistake activity for progress. If you would like to see how this occurs and use an exercise with your planning team, consider the **Planning Worksheet # 4, The Case of the Woeful Master**. Use the case with your group and follow the discussion questions that go with the case study.

The Proof is in the Score

In many respects, planning and football are a lot alike. If you want to be a good coach, you need to know how to follow specific steps, use individual talents and maximize time – all in some predetermined manner – to win in a tough game.

In planning, and in coaching, following a series of prescribed steps in a certain manner will produce results that meet or exceed your expectations.

Unfortunately, the success of your plan may not be as evident as when you coach a team to victory. It's not possible to use a video of your last game or instant replay to see what new moves may be needed to make your plan more relevant, or capture the imagination of members. A plan must be fully developed, implemented and tested over time to determine if it's working or not.

But we can improve upon the likelihood of its success if we follow a prescribed series of steps. We have already begun that process through your involvement in several activities in this Guide.

Actually, it would be best if the steps in developing a plan could be limited to three or four. However, because planning for an organization represents a kind of "system," it must have a logical starting point, an implementation phase and a testing, evaluation and review phase.

In this Guide, we will follow the seven steps listed below.

- Step 1: Identifying Problems or Needs.** In this first step, you will identify the problems and needs of your Masonic organization. You will develop these needs within the context of the overall goals for your Masonic organization.
- Step 2: Establishing Priorities.** In Step 2, you will determine which problems or needs are the most important. You will want to work on these first and give them highest priority.
- Step 3: Setting a Specific Goal for Each Priority.** In Step 3, you will identify goals for each of your prioritized needs. Combined, these goals then become the foundation for the plan for your lodge or Masonic organization.
- Step 4: Selecting the Best Methods to Achieve Each Goal.** In this step, you will examine the many methods of achieving your goals and select those which will work best in your organization. Your choice of which will work best represents your strategy for achieving your goals.
- Step 5: Identifying Resources and Creating the Will to Work.** In Step 5, you will discover the resources your organization has available, and learn the important skills and techniques to help encourage members to achieve the goals of the organization.
- Step 6: Building a Budget to Support Your Plan.** Here you will learn the basics of preparing a budget for your annual plan and preparing simplified financial reports.
- Step 7: Monitoring, Evaluating and Reviewing Your Progress.** This last step will keep you on track and focused on your goals by helping you develop the important reports and project controls you will need.

If you understand these steps and how they fit into the planning process, you should now proceed to Step 1.

Meeting the Needs of Members

The real goal of any Masonic organization should be to meet the specific needs of its members. If that is the organization's goal, the planning process must first identify the needs of members; determine the reasons why the lodge is not meeting those needs; and propose and develop programs that will allow these needs to be met.

Two important elements are needed to properly implement this step: *first*, a desire and willingness to objectively determine the needs of the lodge identified by the members; *second*, the ability to identify and solve underlying causes of the problem.

Many lodges can work long and hard on what they thought was the problem, only to discover that it was a symptom and not the cause they were attacking. Problem identification is critical to the planning process.

Finding Out What Members Want

If your goal is to satisfy member needs, you must find out what your members want. We know of one Masonic organization that has as one of its goals to "delight our members with the quality of our fellowship..."

How did they know to arrive at this as a goal? Quite simply, they asked the members what they expected to get from lodge.

Here are five ways for you to determine what will satisfy individuals with their membership in your Masonic organization.

Before He is Made a Mason

1. Meet with the applicant or new member and have a structured interview to determine more precisely why he is joining and what he expects of his membership.

Focus the interview on questions that will encourage him to reveal what will bring the most satisfaction to his membership. Listen to what he says and probe for accuracy. Be sure you determine the importance of the following:

Fun and entertainment

Role with his family

Meeting new friends

Becoming involved in the community

Making new contacts

Role in providing leadership

Being with existing friends

Making a contribution

2. Develop a survey that gives the potential member an opportunity to express his expectations in a more private manner. Make sure the survey is completed while he is with you. If the survey is mailed to his home, you will probably not get it back. Consider combining the survey with the personal interview.
3. Listen to the family. A spouse, mother or friend will often have real insights into the needs of a member and can feel comfortable sharing them with you. The needs of most men are not complex, and it will not be difficult for you to discover the three or four needs that will become the focus of the planning effort in your organization.

The Important Needs of Future Members

Recent Studies on What Men Want and Need

In a recent survey completed by the Imperial Shrine, researchers asked men age 35-55 who did not belong to any organization what their attitudes were towards joining and the benefits they expected from any organization they might join. The results were important and clear both in light of what attributes were most appealing and which attributes of an organization would "turn them off" and limit their joining. Their responses are listed in the order of relative importance below.

Study this information to determine how to best use it in determining the needs of future members and prioritizing those needs for your lodge.

Most Appealing

All races/groups	65%
All religions	62%
Males and females	47%
Easy to join	44%
Making new friends	44%
Fellowship	38%

Most Unappealing

One race/ethnic group	59%
Secretive	51%
One religion	51%
Exclusive	41%
Substantial fees	40%
Male only	36%

All races/groups
65%

All religions
62%

Males and females
47%

Easy to join
44%

Making new friends
44%

Fellowship
38%

One race/
ethnic group
59%

Secretive
51%

One religion
51%

Exclusive 41%

Substantial fees
40%

Male only
36%

Case: The Diagnosis, Doctor?

Fred Happenstance had just completed his annual physical and was waiting for the doctor to discuss his general good health. He was not worried because he felt great. That didn't last long.

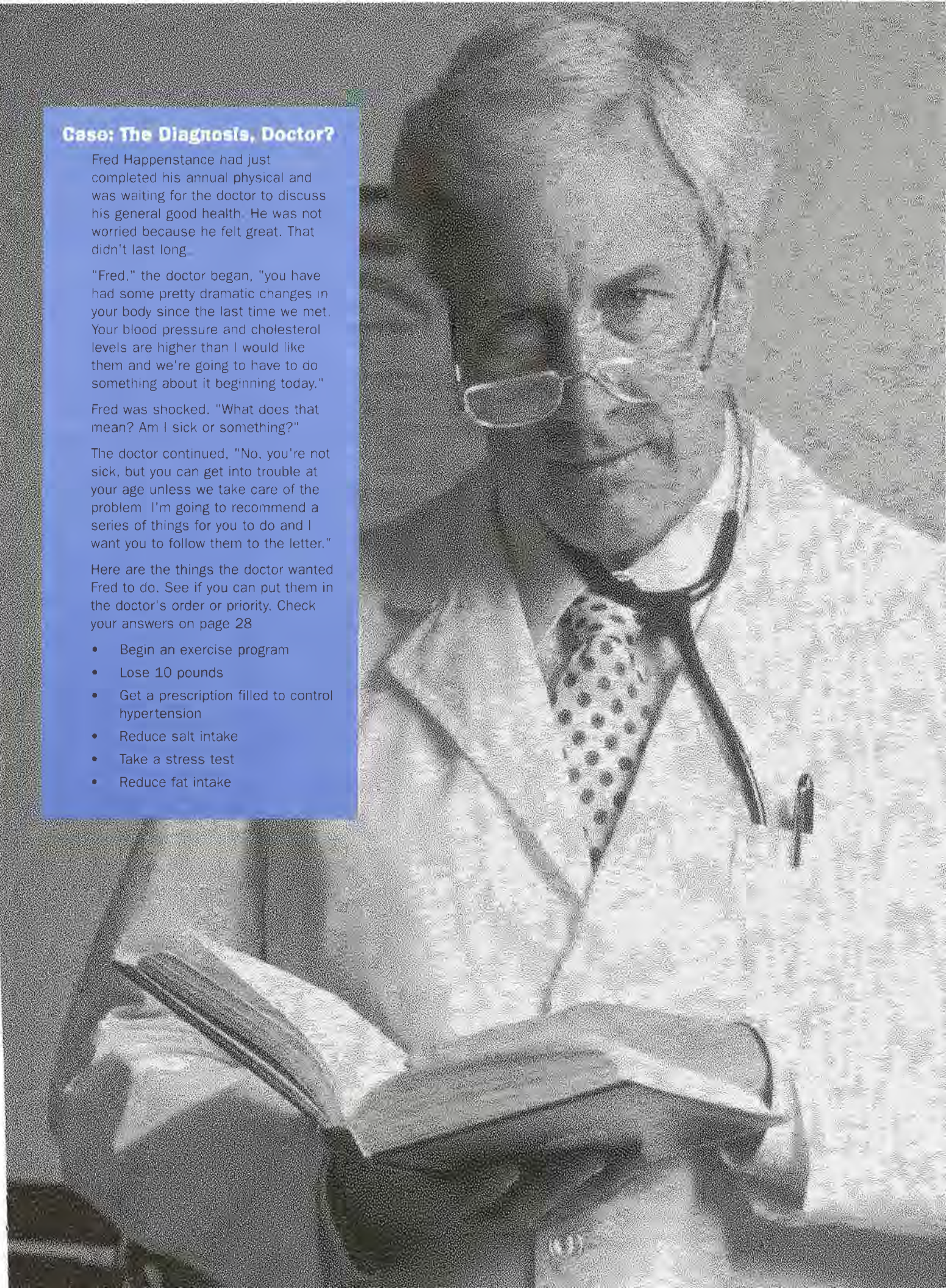
"Fred," the doctor began, "you have had some pretty dramatic changes in your body since the last time we met. Your blood pressure and cholesterol levels are higher than I would like them and we're going to have to do something about it beginning today."

Fred was shocked. "What does that mean? Am I sick or something?"

The doctor continued, "No, you're not sick, but you can get into trouble at your age unless we take care of the problem. I'm going to recommend a series of things for you to do and I want you to follow them to the letter."

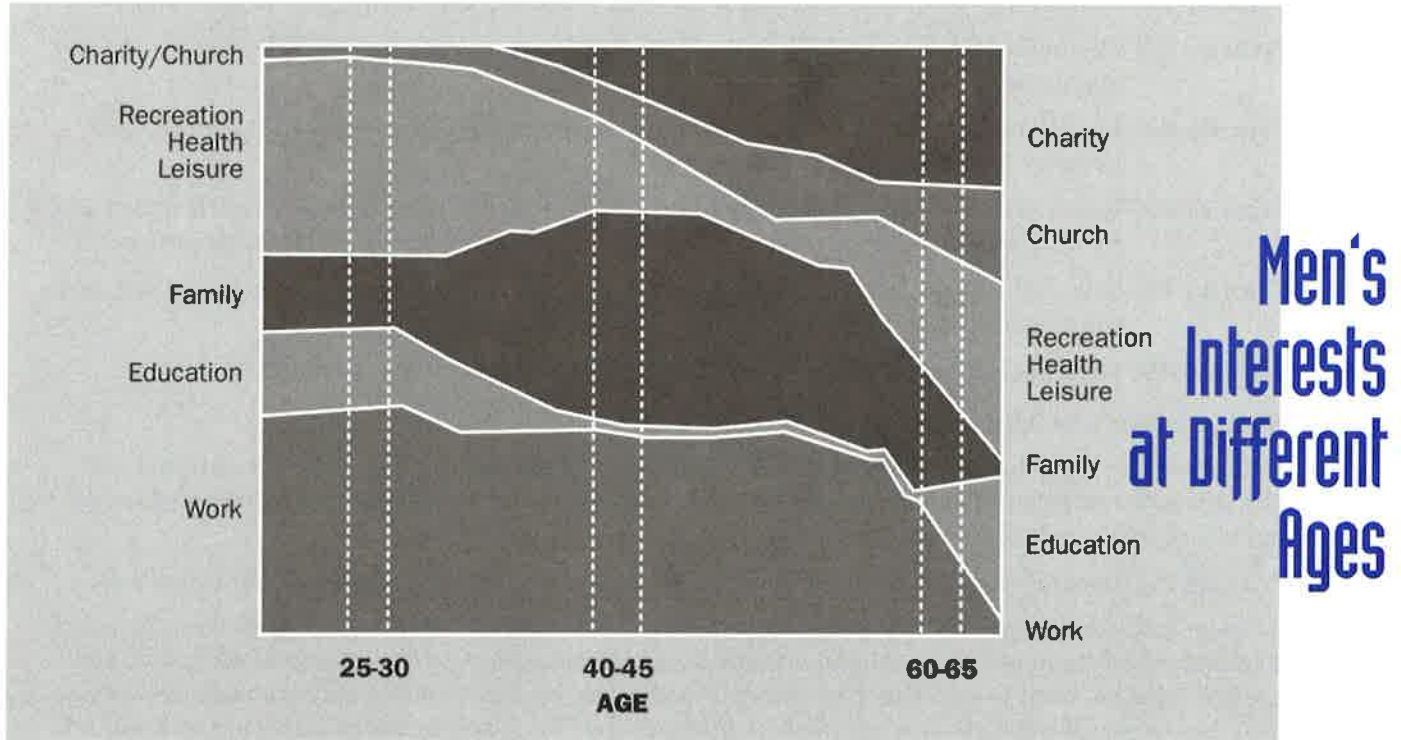
Here are the things the doctor wanted Fred to do. See if you can put them in the doctor's order of priority. Check your answers on page 28

- Begin an exercise program
- Lose 10 pounds
- Get a prescription filled to control hypertension
- Reduce salt intake
- Take a stress test
- Reduce fat intake



The Importance of Time in Developing a Plan

The priorities of members of different ages differ significantly. To see how this might affect your lodge, use the chart below to discuss the following seven questions (for a more detailed look at this chart and a more detailed explanation, see the Membership Development and Management Kit and Trainer Kit developed for lodges by the Masonic Renewal Committee).



1. What are the specific programs or events you might plan that would interest younger members? How might these "turn off" many older members?
2. What program might you develop that would interest both?
3. What are the important priorities of men who are 25-30, and how are these different from men who are 40-45 and 60-65?
4. What needs of youthful members might be considered irrelevant by older members and vice-versa?
5. If your lodge decided to get involved with the community's schools or educational television, with what age group might this involvement run into "trouble" and why?
6. Can you use this chart to support the conclusion that a man who is 35-45 is at a perfect age to become a Mason?
7. How will you resolve difficulties based upon age?

What Determines the Number of Priority Areas Selected?

The number of priorities identified will be determined by these factors:

1. The importance of a particular need to the satisfaction of a majority of members and their interest in supporting it.
2. Available manpower that can be developed in the lodge.
3. Financial resources existing or available through development.
4. Commitments the organization has already made that cannot be "changed."
5. The quality of leadership and the structure of the lodge.
6. The ability of the leader to get the lodge to focus on the future.
7. The willingness of the lodge to change.

Priority #4 Developing and implementing opportunities for members to be leaders in the lodge, and developing and implementing management and leadership development programs.

This has been identified as the fourth area of priority for any Masonic organization because of its dual benefits: The existing leaders of the lodge need leadership and management development to do their jobs even better, and the men who become Masons do so with the expectation that they will not only be well-led but will also be given the opportunities to lead. Both of these are needs and priorities of any lodge that wants to not only survive, but thrive in the 21st century. For many lodges, this fourth priority becomes #1 as Masons begin to discover what leaders do.

Priority #5 Creating greater interest and awareness of Freemasonry among existing members and the community, and attracting new members to the Fraternity.

It's important to consider this priority later in the process, even though most lodges consider it their most urgent need. Because this priority is based upon the needs of the lodge to attract more members, if the lodge does not solve the other problems identified in the other four priorities, those men who may join will either find the organization unappealing, or join and quickly lose interest. Strategically, this is among the most important, but one of the most difficult concepts for most Masonic leaders to understand. As a result, it is quite possible for a lodge to postpone priority #5 until the other problems have been solved.

Priority #6 Creating a relevant lodge that will thrive in the 21st century and beyond.

It will be very difficult to attract and retain the kind of men Freemasonry needs if the lodge is viewed as out of touch or irrelevant. The lodge can be viewed as irrelevant if it has not changed with the times, if it is not aware of the changes in society, or if the active leadership insists on keeping everything the way it has been. Youthful members will not enjoy a lodge they view as out of touch.

Developing Priorities for Your Lodge

In Step 1, you identified the needs of your lodge and "pared them down" to the precious few. In Step 2, you have been discussing how leaders prioritize the work to be done into a series of the most important needs of the organization. Now it's your turn to prioritize the needs of your lodge. Make sure your list is limited and achievable.

Use **Worksheet #6** to prioritize the most important needs of your lodge and the specific benefits to members.

Priority #1 (Develop a full explanation of the priority)

Reasons why this needs to be undertaken first

Specific benefit to members

Priority #2

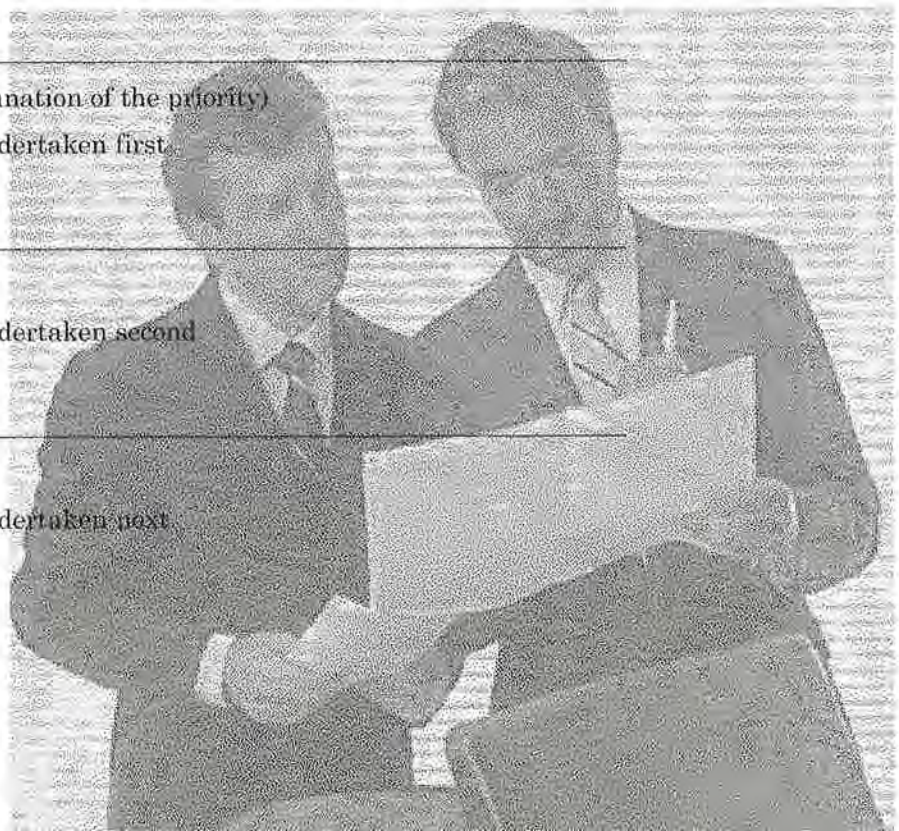
Reasons why this needs to be undertaken second

Specific benefit to members

Priority #3

Reasons why this needs to be undertaken next

Specific benefit to members



Goals must reflect progress.

Many of the priorities you have identified cannot be solved in a single year no matter how specific your goals are. Success is a journey, just as becoming a Mason is a journey. Success in renewing the lodge begins with the planning activity you are currently undertaking. It will continue through the many important steps you will take during your year as leader.

In order for goals to reflect progress, a time frame must be established which provides a target for when you and your members can expect accomplishment.

Goals must be specific and identifiable.

By writing down the goals for the year, several important things happen. The act of writing it down helps you crystallize thoughts, and this thinking process can stimulate action. You can see what you want to accomplish, and thus you are more likely to avoid the distractions or obstacles that might prevent the lodge from attaining its goals.

"We are going to solve the drug problem" or "We are going to get more involved with the young people in our community," are not specific goals. They offer a confused and fuzzy idea that can quickly get out of focus.

"Our lodge will host three events for the young people of the community within the first three months of the year and provide them with a meaningful incentive to attend" is a specific and measurable goal.

Goals must be measurable.

You will never know when you have accomplished what you set out to do unless you have some measurable index of when you will be finished.

"I am going to lose 20 pounds in the first three months and go to the gym three times a week for 90 days" are clearly measurable goals. The person who has these goals has prioritized his or her life in terms of good health and good looks.

Case: The "Goalless Wonder"

William Bennett, the Senior Warden, was quite smug about a lot of things, but nothing infuriated those in the line of Hebron Lodge #262 more than his refusal to discuss his plans for the year.

"Just wait and see," he would say. "You'll learn soon enough."

To the rest of the leadership the story was all too familiar. Each year the lodge had to wait until the new Master announced his program in order to know what they were going to do. No one knew which committees would be needed, who would do what and whether the programs developed during the current year would be sustained.

Some thought it was not such a big deal since the lodge really hadn't done much of anything for years. The real job of the Master was to run the lodge, and there was no question that after five years in the line he was capable of doing that.

Jack Arnold, however, didn't see it that way. He worked for PPG and his experience on his job was that you needed to have clearly identified goals stated well in advance of the year, and a commitment of the leadership to meet these goals.

In an upcoming meeting, he was determined to ask the Senior Warden more specifically about his plan and goals and to offer his help in making his goals a reality. When the meeting had been underway for about 20 minutes and nothing had happened, Jack turned to the man who would be the next Worshipful Master and said, "It would really help me a lot – and maybe some of the other Brothers – if you could be more specific about what you want to accomplish. Exactly what goals do you have in mind for next year?"

A Look at Organizational Goals

On this page, you will have the opportunity to examine four goals for a lodge. These sample goals may be helpful in helping you clarify what you want to accomplish. However, you will *not* want to adopt them unless you have defined the needs of your lodge, prioritized those needs and agreed which are the most important. These priorities were developed in Step 2.

Goal Setting

***Priority #1* Identifying, developing and implementing programs that delight members.**

Develop and implement three new programs appealing to younger men by the fall of 1995.

Develop an events-planning committee and develop a 12-month plan and budget.

Measure member responses to new programs and report results to the planning committee.

***Priority #2* Getting members into the lodge and involved in programs that provide benefits through membership.**

Increase attendance at monthly stated meetings by 15% by December, 1996.

Increase attendance among recent Masons by 30% by the end of 1996.

Identify the specific expectations and benefits expected by every new member.

Develop a means by which the satisfaction of members can be measured and reported.

***Priority #3* Identifying and securing the funding necessary to support and sustain program and member interest.**

Develop a line-item budget for the lodge for the next full fiscal year.

Develop a presentation that explains the lodge's needs for funds for priorities #1 and #2 .

Develop a better understanding and awareness of fund-raising and the role the lodge leadership needs to play in raising money.

***Priority #4* Developing and implementing opportunities for members to be leaders in the lodge, and developing and implementing management and leadership development programs.**

Improve the leadership development skills by getting the top four lodge officers into one leadership seminar in 1995.

Locate three members in the lodge who have experience in leadership, management or training and enlist their support during the initial development phase.

Locate three other sources of leadership and management training and determine their possible application to the leaders of the lodge.



Task and Time-Specific

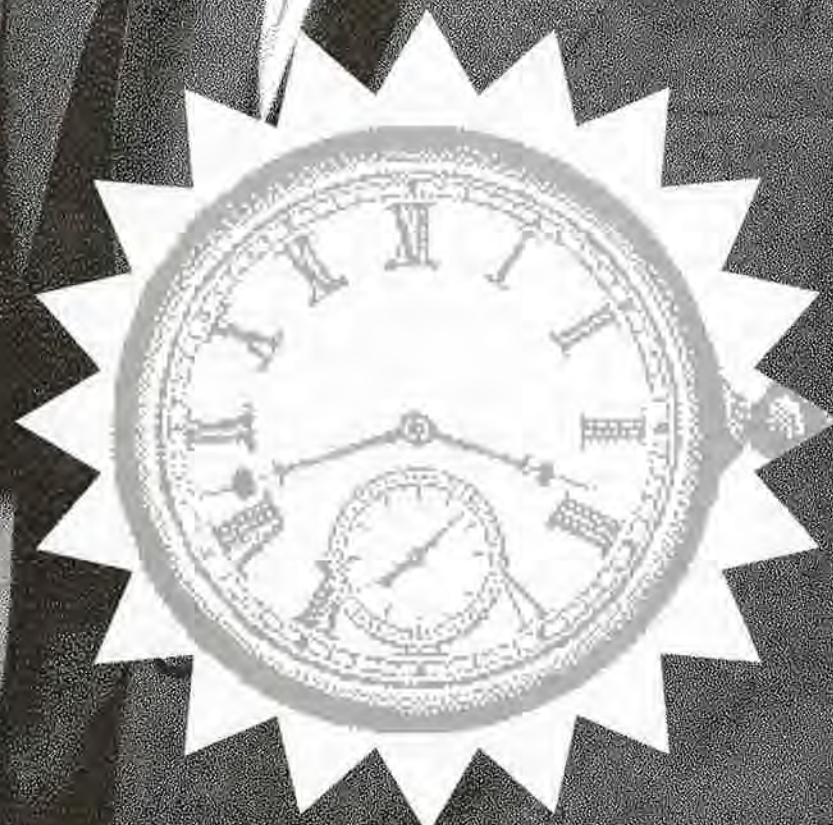
Projects and actions like you will be considering need to be task and time-specific.
What does that mean?

The easiest way to understand this is to recognize the importance of accomplishment as a motivator. You'll discover much more about this in Step 5, "Identifying Resources and Creating the Will to Work." But what you need to know for this step is that the willingness to work is directly related to the individual's perception that there are defined tasks that must be accomplished in a given period of time. We need to stack all of the boxes in the corner before breaking for lunch.

When you develop the projects, actions or methods of meeting each goal, keep the importance of accomplishment as a motivator in mind.

Selecting from Among Alternatives

Several alternatives for projects or actions to accomplish a goal are usually available. Through study and planning, and with the knowledge of the resources you have available, the best method should be selected. Frequently, the complexity or scope of the problem (the goal) may require more than one action to be undertaken, and for one project or action to precede another. For example, if the lodge was considering the purchase of land for a new building by 1998, one project may be required to raise funds, another to get the land rezoned and a third to design and construct the building. Each of these actions would be related to the goal of relocating the lodge before the end of 1998.



Develop and implement three new programs appealing to younger men.

What are the key results expected from this goal? Well, it's clear that the lodge needs to develop programs that appeal to younger men. What action steps would you take to accomplish this goal? Examine the actions stated below, and determine whether they contribute to meeting the goal. Don't worry about the order of events right now. Consider them for their value as a solution.

1. Develop a Project Planning Form before beginning your work with this goal.
2. Develop a series of questions you want to ask your youthful (under 45), recent members to determine their interest in the lodge and to learn what appeals to them.
3. Conduct a personal interview with each recent Mason to determine what they expected when they joined, and how the lodge could better meet their needs.
4. Develop a questionnaire to be used with each new Mason to determine their reasons for joining and their expectations (meaning what will satisfy them and "justify" becoming a Mason).
5. Review and organize the responses into groups of similar type activities. Determine if a program for the lodge can be developed and implemented in each of these areas. You are most likely to discover the needs are centered around:

Having fun and being entertained

Meeting new friends

Enjoying Masonry with their family

Sports and sporting events

Participating in planned community events

Health and fitness issues

Learning about Masonic history

6. Identify the three most frequently mentioned activities. Determine which recent member might serve as the chairman of a planning committee for one event.
7. Ask each committee chairman to form a small committee of members of the lodge, develop a simple plan for the event his committee proposes and submit it and a budget for review.
8. Meet with each committee chairman. Go over the individual plans and budget. Answer any questions he may have. Ask him to develop a final plan and budget.
9. Submit the plan and budget to the appropriate leadership in the lodge and seek approval.
10. Follow the suggestion on monitoring progress outlined in Step 7, "Monitoring, Evaluating and Reviewing Your Progress."

Developing Action Plans

As you can see, you are going to need considerable time and assistance from a number of members, to develop all of the action steps for each of your goals. Even though some will be very simple, easy-to-accomplish actions, you will nevertheless, need to put them into your plan so you know what steps you need to take to make progress.

Action Planning Guide

Now is the perfect time for you to try to develop your skills in determining which action steps will best achieve each goal or objective for your lodge. In fact, when the plan for the lodge is completed, there will be many different action steps each related to a particular goal for each prioritized need. In the space, below, begin to develop your action steps. Each committee will need multiple copies of **Worksheet #11**.

Prioritized Needs

Goals to be Met

Action Steps

It is clear that Lodge C has more active and available manpower to assist in meeting lodge goals. But it was not always that way. The improved attendance was the direct result of the successful implementation of events the lodge had planned to appeal to members, and which involved the lodge and its members in the community.

More than Counting Heads

The total manpower resources available to the leadership of the lodge for the action steps or projects in your plan can be increased in two fundamental ways:

1. By a careful review of the current members of the lodge, and by asking people with specific skills and experience to help accomplish specific goals.
2. By widely publicizing the plans and activities of the lodge, accompanied by follow-up phone calls to encourage wide participation and involvement.

By looking at other factors of your membership, you can further optimize your available manpower resources. There is a direct correlation between the age of members and their interest and willingness to serve on committees and to do the volunteer work your lodge may need.

As an effective way to manage the manpower in your lodge, group members into two broad categories:

Recent members, active and inactive, between the ages of 21 and 45 (by recent, we mean having joined in the past three or four years).

Inactive members over the age of 45 who have not attended lodge in the past three years (approximately 65%-75% of many lodges' total membership).

Age Plays a Role

You will find the attitudes of these groups differ somewhat. The more youthful, recent members will have joined the craft with the expectations of involvement. These men will be more willing to participate in lodge events and to help plan and implement special programs.

The second group of inactive members may need to be handled more carefully if you expect them to become involved in the lodge. The longer a member has been inactive, the less comfortable he may be in rejoining the lodge. His problems may range from not knowing anyone in the lodge, to having forgotten the signs and words that he needs to be admitted. He may also have been dissatisfied with certain aspects of the lodge when he was last present. He could be bored with lodge inactivity, distressed with lodge leadership, uncomfortable with the amount of ritual or other factors. You will need to discover why he has been inactive and help and encourage his reinvolved in lodge programs.

There are also other manpower resources available to the lodge including the following:

- Spouses of Masons, particularly the more recent, youthful wives and friends.
- Members of lodge-sponsored youth groups including DeMolay, Rainbow and Jobe's Daughters.
- Family members, particularly sons, who may not be active in any Masonic organization.
- Friends and relatives of Masons who can be "recruited" for important community projects.
- Members who are active in the Shrine or Scottish Rite/York Rite bodies, but who have not been active in the lodge.

Many Masonic leaders are not aware that asking a member to serve on an active committee or to be responsible for an event or to do work for the lodge is a motivator. That may seem strange if you have trouble getting Masons to do things, but if you properly match the man to the task, provide him with direction, tell him why the task is important, generally, he will do the job and do it well.

External Gifts

Members of the business community will generally support a planned event that benefits the entire community. They will be less inclined to support an event that benefits the lodge. They will want to know specifically how the funds will be used, how accountable the organization is, and who will benefit. A carefully constructed plan of action will increase the chances of their support. Displaying the name of their business may or may not be needed. If so, including names in a program or at the event will be important.

Raising Dues

Few words are more emotional to Masons than the prospect of increasing dues. By the same token, even the staunchest traditionalist understands that things cost more today than they did years ago. Most can also see that the dues have not kept pace with time. Still, raising dues is a long-term prospect. But it can be done particularly if the lodge has a reasonable plan for how it intends to use the additional funds. Thus, the plan you are developing can be an important element in helping your lodge explain to members why additional dues are required.

Raffles, Games of Chance and Other Methods

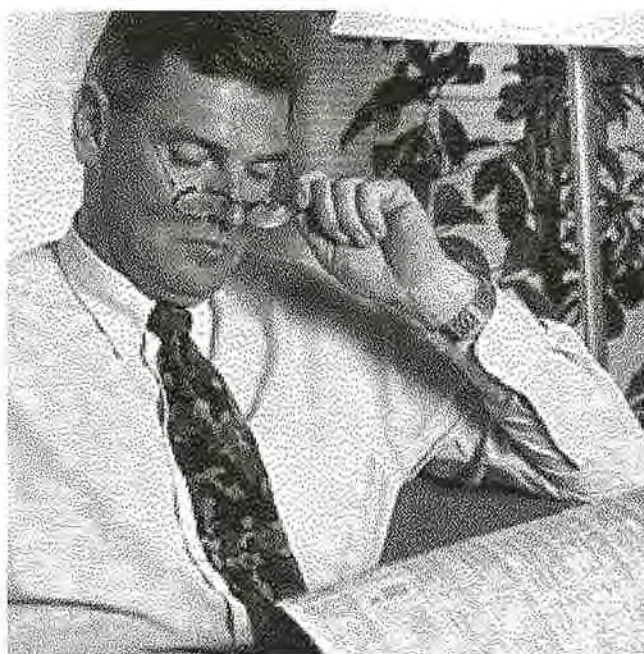
Many jurisdictions do not allow the lodge to consider these options. However, where it is not prohibited, lodges can raise significant funds from the public at large by offering a defined benefit for the ticket they purchase or for the games of chance. Although best limited to community carnivals or state fairs, these methods have been used successfully to raise considerable funds for the lodge. They also provide an excellent opportunity for the lodge to display the special charity it supports, and to make additional information available to the public about the Fraternity. Check with an accountant to learn how fund-raising of any type might affect the nonprofit status of taxes for the lodge.

Bringing It All Together

It is now time for you to complete the final two parts of your plan for your lodge. So far you have defined the needs for your organization, prioritized these needs, developed goals for each need, and developed action steps for each goal. Now you need to identify those responsible for each action step and establish the amount of money to budget for each activity.

Below is a single line item from a plan for you to study.

Now complete the Responsibility column on the Planning Worksheets you have developed for your lodge by identifying who will be responsible for each action step in your plan. Use **Worksheet #13** for guidance.



Prioritized Need	Goal to be Met	Action Steps	Responsibility
Identifying, developing and implementing programs that delight members.	To develop and implement three new member programs appealing to younger men by the fall of 1995.	Develop a Project Planning Form before beginning your work with this goal.	Ralph Jacobs Tom Watson

Even though this list is quite complete, the actual line item amounts will be different for every family just as a budget for one lodge will be different from most others. The amount and the categories in the annual budget will be different because each lodge will have a different set of prioritized needs, goals and actions.

Therefore, dividing the budget into different categories can be helpful. Many lodges use the following three categories:

Operating expenses – those items that the lodge requires in order to stay open, staffed, and provide basic services to members such as telephone, office materials and supplies, printing, postage and other expenses.

Building, grounds and maintenance expenses – those items related to the service of outstanding debt, the costs of building upkeep and maintenance, fuel, snow removal, cleaning, heat and air, etc., these expenses are more or less fixed.

Program expenses – those expenses that will occur as a result of the approval of programs developed in the annual plan. These typically include funds provided for major projects, new communications, membership development materials and supplies, special travel, training and development or related costs.

If you do not feel these categories are helpful, a single grouping under Expected Disbursements will do just fine.

Balancing the Budget

A budget has balance because revenues and expenses are nearly the same. Revenues include funds received from dues, building rentals, gifts and contributions, special events and sales. The amount of money a lodge expects to have in the next planning year needs to be very realistic. The flow of these funds – the months in which these funds come to the lodge – need to reflect the actual availability of money. You will find it difficult to work with money you don't have. Therefore, just as the expense areas of a budget have a cash flow, so do the revenues.

You make similar calculations about your personal budget. You factor in such revenue sources as salaries, bonuses, commissions, special gifts, income tax refunds, rebates and other sources. If you do not have enough revenue to cover your expenses, you will face precisely the same decisions your lodge will face:

- Find more money (through a second job)
- Save on expenses
- Defer purchases (change programs or products)
- Find another earner in the family
- Or, incur debt.

Some of these choices are more acceptable than others, but in reality, all are open to most people and most lodges.

Where Does the Budget Fit

For Masonic purposes, the budget should be approved when the plan for the lodge is approved. Meaning if the members of the lodge approve certain actions, like those outlined in your plan, they should also approve the financial resources required to make an action possible.

The approval process for the budget should be undertaken during the discussion of the program and its validity and how it meets a need in the lodge. If the program is approved, the budget should also be approved.

Too often, Masons approve the concept – even the program – and then reject the funds that will be needed to accomplish what they have earlier approved.

Adjusting for Occurrence

Not all expenses occur every month. Some expenses are one time amounts. Other expenses need to be captured in the month in which they occur.

For example, below is a twelve month budget for four common lodge expenses. Study each item and determine why the expenses have been budgeted as we have shown them here.

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
Salaries and related (all)	\$130	130	130	130	130	130	1050	130	130	130	130	130	\$2480
Utilities	120	140	130	130	95	90	60	60	120	130	130	140	1345
Renewal programs		250			500					250			1000
Insurance										1500			1500
Total	\$250	520	260	260	725	220	1110	190	250	2010	260	270	\$6325

Getting Your Budget Approved

Your budget should be presented as a package to the voting membership. If your leadership has done the right job, they should be able to recommend its adoption as submitted and avoid a discussion on line items.

You may have heard that your governor or mayor wants a "line-item veto." This is important in some areas because many budgets are approved without the ability of the chief executive to change, delete or add a new item of expense. The budget must be approved or rejected as submitted.

For the lodge, the approval process needs to be for the budget as a whole. Line item vetoes of the budget will be a very disruptive and frustrating exercise.

Masons who were not involved in the process of developing the program should be asked to approve programs as presented. Discussion of the merits of the program may need to come before the entire membership, but once the program is approved the budget to support it should be approved also.

On **Worksheet #14, Examining a Typical Budget**, you will see the annual budget for a lodge of 250 members which was developed after the lodge had been through the annual planning process outlined here. Study the budget carefully and use the questions on **Worksheet #15** to develop greater understanding of the budgeting process. When you are ready to try your hand with your own budget, consider **Worksheets #16, #17 and #18**.

- Ask team or committee members to present their report according to the format agreed upon in advance. This should include the objectives, progress to date, success to date, problems encountered and solved, problems anticipated, progress next 30 days and an analysis of the costs incurred to date.
 - Conclude by establishing the goals for the period until the next meeting, the specific nature of the assignments, the assistance or help members may require, and the date and time of the next meeting.
3. **Develop and maintain minutes or a log of activity.** This will enable the members of future committees or teams to understand your progress and your problems. It will also provide a chronicle of the events and serve as an official record of when problems were first encountered, and how each was handled.

Include with the log all pertinent correspondence, exhibits, publications and related communications that will be helpful in future planning and problem solving. To the extent possible, publish and distribute the minutes or log as soon as possible after each meeting and actively solicit feedback from participants. This will encourage their involvement and help convince them that they are really part of the process.

4. **Manage and direct the communications to members.** Remember, the members are going to want to know what you are doing and your progress. If your planning team has involved the members in its goals from the beginning, your reports to them at this stage of the process should be very encouraging and welcomed. However, this is not always the case. Often there are members who do not agree with the approach, are resistant to change and suspicious of anyone who wants to try to do something different – particularly in areas as sensitive as some renewal activities.

There are several ways to communicate with members:

- Include a monthly report of progress towards goals in the lodge's Trestle Board.
 - Publish single-page reports and post them on the lodge's bulletin board.
 - Submit major accomplishments to the publisher of the state or province Grand Lodge publication.
 - Submit a news release of major accomplishments that affect the community to the local press for possible publication.
 - Hold a quarterly meeting with all members, or use a social meeting or a scheduled meeting to have committee chairmen or team members develop and present their progress.
5. **Develop with the leadership of the organization a special action incentive award** which can be presented to the chairman, to a member of the committee or team or to all team members when a particular action plan has been completed, and the results meet or exceed expectations. This is a particularly helpful method of increasing participation and is further evidence of your awareness of the importance of recognition as it was presented in Step 5.

These special awards could include a plaque, pin, recognition board or Member of the Month photographs based upon the following:

Action Planner of the Month

Team Leader

Key Man Award

Best Problem Solver

Reviewing Results Compared to the Plan

The real intent of this step is to provide Masons with techniques they can use to make sure that all of the time and effort that went into the development of needs, goals and actions is not lost for the lack of a review and reporting process.



Making a Bold Move

Never be hesitant about replacing a project or an action plan that is not producing the desired results. There is no unwritten rule that you can't "drop" a project currently underway. If there is insufficient reason to continue, if events or circumstances change, or if there is insufficient support – drop it!

Remember, it is the realization of the lodge's ultimate goals that makes the real difference and determines the lodge's success – not the completion of any one project.

Use the evaluation portion of this planning process to provide leadership for difficult projects.

Examining What You Have Just Completed

If you have followed the seven steps in this Guide, you should have developed an annual plan and budget for your Masonic organization. You may not be as satisfied the first time as you might be. However, you will get better at planning and budgeting as you have more experience.

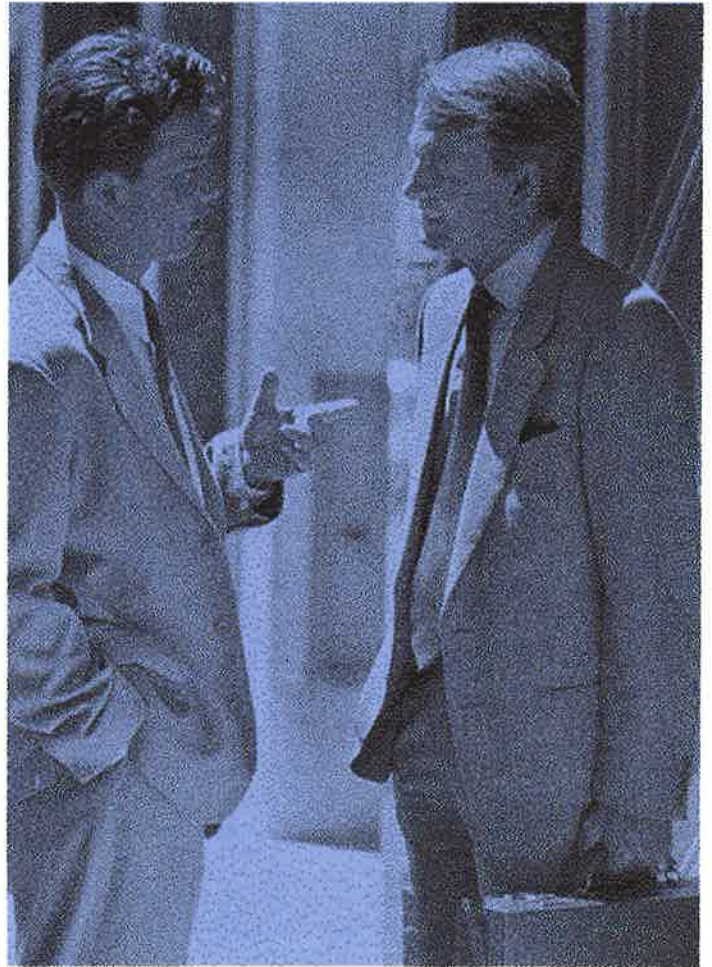
If you are like many who discover these planning skills, you may also find these steps useful in your job, advocacy or your home. Planning is a way of determining what must be done, in what order, by whom, and at what cost, in a manner which provides maximum confidence that you are always in control of the outcome.

The Annual Plan Has Its Place

As we said in the beginning, the annual plan should be viewed as a yearly step toward accomplishing your long-term or strategic goals. If you were a high school sophomore and were determined to become a preeminent surgeon, you would need to develop a 10 year plan. Your goal of becoming a preeminent surgeon suggests that there are certain things you should do, or will be required to do each year beginning with the type of classes you take in your junior year, how you spend your summers, the books you will need, to the languages you will need to master and so on.

So it is with the lodge. The importance of the long-range, strategic plan, more particularly, the vision you or the leadership of your lodge has developed for the future, provides the same choices for annual programs, events, actions and decisions.

The annual plan and budget are two important skills leaders of Masonic organizations will need to develop for the future...beginning today.



***Good luck
and good planning.***

Because we understand the needs of future Masons, present Masons must build in change. Old ways of doing things – almost everything – will need to change.

Lodges that are inactive will need to become active. Lodges without able leaders will need to find or train men to lead.

Lodges who waste time will have to save time. Lodges that exclude the family will have to include the family. Lodges that count on ritual to the exclusion of all else will need to include all else and still count upon ritual.

This change – and others not yet considered – will not be done by timid men. Nor will it be done by men who sit in the East a single year. It will need to be done by the lodge, and by men of great courage.

There will be many who will say it should not be done and try to stand in the way. The blueprint's great value is that it will help those empowered to change to stay the course. To prevail because the path to the future has been well defined and that Masonry will be enhanced not diminished as a result.

The Next Step

Blueprints define the boundaries. Then the real work begins.

Knowing what the structure looks like does not tell us how to get there. Blueprints are outlines. Craftsmen must work with real materials. They must chip and frame and nail and plane each piece so that the structure comes together as one.

Typically, builders start with the foundation. Masons have their foundation fully defined. They did so in two strategic planning conferences in 1991. Now the building can begin.

Masons know that they must still define the ways in which the Fraternity will be involved in the community.

Masons know that they must help lodges with the issues of using time and adding quality.

Masons know that they must have a program for leadership development.

Masons know that they must still define a compelling national problem Masons can help solve.

These and other questions will need the thoughtful attention of Masons who will develop a specific plan and specific products to meet these and other challenges of the Craft.

As a result, the blueprint suggests that the strategic planning conference initiated in 1991

will continue indefinitely and be the strategy-setting forum at which Masons from throughout North America may gather to discuss and resolve the critical issues facing their future.

In the meantime, progress in producing the products useful and imperative at the lodge level must be continued. The development of the Membership Development and Management Kit must be followed by regional membership management symposiums to which lodges may send a representative to learn more about implementing the program.

All of which means that support must continue to come from sources already identified and from those yet developed. Support must come from the sale of existing products to the more than 15,000 lodges in North America. Support must continue from the Scottish Rite Bodies and from the Shrine. And it must come from you.

The Blueprint for Masonry is well defined. The willing hands of Masons to build upon it is well known. The vision is clear. Together, we can make it happen.



**Masonic
Renewal
Committee
of North
America**

For additional copies please write:
The Masonic Renewal Committee of
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What Does This Mean in Your Lodge?

Achievement: Members get real satisfaction by getting work done. Give a man a task to do that he can accomplish in a specific period of time, and getting that work done is a real motivator. This important motivator can be misused if a man is given more work to do than he can accomplish. His inability to get work done is a serious and long lasting demotivator.

Lodge Application: Carefully define the work to be done in terms of what needs to be completed by a specific date. Break larger tasks into several smaller tasks. Be very aware of when the task is completed and use other motivational opportunities including recognition and advancement.

Recognition: Once the task at hand has been completed, leaders of the lodge have an important opportunity for additional motivation by making a point of recognizing the accomplishment of the task. Masons have many ways to recognize the achievement of members. As you can see, the dissatisfaction occurs when work is not recognized, and is not only significant but also reasonably long-lasting.

Lodge Application: Make sure the recognition is specific to the goal or the task. The more specific the better. Posting accomplishments in a prominent place in the lodge, publishing accomplishments in a newsletter, or recognizing a member as Mason of the Year are ways to recognize achievement.

Work Itself: There is a direct relationship between motivational opportunities and the tasks or work we assign to a person. Hertzberg discovered that matching a person to the task – giving a person something to do that was in his area of expertise or interest – was a motivator and enhanced the will to work. Conversely, mismatching worker and the task was an important reason for dissatisfaction.

Lodge Application: Try to determine the interests of each member and then carefully match work to the man. A man who loves to build things from careful plans, will work harder and more effectively if you can match his task to his interests and abilities.

Responsibility: When the Master of the lodge keeps all of the important jobs to himself, or carefully delegates them to the same individuals, he misses an important opportunity to use this powerful motivator. Masons welcome being responsible for a job. Responsibility can be delegated. A man who is responsible must be given the authority to make decisions that will allow the work to be done. Ultimately, you will remain responsible for the work and the person you select will be accountable to you. Responsibility and accountability are motivators.

Lodge Application: Carefully delegate tasks to members. Clearly define the work to be done. Explain the importance of the job, and where it fits into the goals for the lodge. Allocate the necessary resources, and free the man to do the work. Virtually every member of your lodge will accept the responsibility for work.

Advancement: When all of the factors you have just discussed are applied, a climate of highly motivated members result. The final opportunity is to use the good work of members as a reason for advancement. In the work place, promotional opportunities provide an opportunity for advancement.

Lodge Application: You may think this works better in the work place where there are specific titles and other opportunities, but you can still recognize the hard-working members of your lodge by giving them increasingly more important responsibilities as committee chairmen, providing them with opportunities to represent the lodge at meetings, or asking them to facilitate meetings. Of course, advancement within the formal structure of the lodge is also an opportunity, but make sure this is what the man wants or the effects of the "promotion" may not be motivational.