

# Worksheet 1

## Team Profile - An Example

Reference  
Getting Organized  
to Plan  
Page 7



**Cabinet Position:**

**Leadership Development**

**Reports to:**

**Lodge Board of Trustees**

### **Scope of Responsibility**

Too often, the leadership of the lodge is left to chance. Men who have skills in ritual may become leaders of a lodge with only minor skills in other important areas. These skills can be developed in most Masons. Training in these important areas can have additional benefits related to the individual's career, and to life in general. The successful incumbent will be responsible for the identification and implementation of skills development programs in areas such as leadership, management, and strategic planning.

### **Principal Duties and Responsibilities**

- Develops annual leadership development objectives
- Conducts lodge training needs assessment
- Develops inventory of member skills
- Identifies existing leadership and management skills development programs
- Uses an interview process to identify individual leadership and management skill levels of all lodge officers
- Develops the leadership development action plan
- Organizes and develops a cadre of trainers who can deliver identified training programs

### **Preferred Experience**

- Human resources or personnel management experience
- Prior adult teaching/training experience
- Supervisory/managerial experience in industry, services or education
- Previous assessment and/or counseling experience
- Experience in an organizational "change" effort
- Skills required include planning, problem solving, team building, time management, and supervisory development

### **Performance Will Be Thoroughly Satisfactory**

- The lodge has a system for developing leadership and management skills for members
- The lodge has scheduled training and development in critical result areas
- The lodge has identified those with abilities in training and development
- The lodge has a profile and a skills inventory recorded for each new member

# Worksheet 2

## Helping Discover The Needs of Lodge

Reference  
Defining Goals and  
Objectives  
Page 9



This form will help you discover the real needs in your lodge. Read each of the situations carefully and use the 5 point scoring indicators. On this form, a “5” means that this is an important need of the lodge and needs to be part of the planning process; a “1” means it is not important. After completing this survey, use Planning Worksheet #3 to discuss your responses.

### Category of Need

- 1. Fellowship:** Most men who become Masons indicate that their need for good fellowship is high among their reasons for joining. What is your assessment of the level of real fellowship in your lodge? A score of 5 means you strongly agree with each point.
  - 5 4 3 2 1 Level of fellowship is uniformly high
  - 5 4 3 2 1 Need to improve members' awareness of the importance of fellowship
  - 5 4 3 2 1 Leadership is actively involved in fraternal relations
  - 5 4 3 2 1 Can point to specific programs that promote fellowship
- 2. Focus:** A lodge, like any organization, has a culture. This culture represents the standard way of doing things. Another way of saying this is that the focus of the lodge can be on maintaining the status quo, assuming an aggressive stance towards change, or focusing upon the needs of members. To what degree do each of the following reflect the primary focus or culture of your lodge? (A “5” means highly representative).
  - 5 4 3 2 1 Lodge is very involved in maintaining status quo
  - 5 4 3 2 1 Lodge is very aware of the importance of change
  - 5 4 3 2 1 Lodge is committed to leadership development
  - 5 4 3 2 1 Lodge is committed to member needs satisfaction
  - 5 4 3 2 1 Lodge is committed to making changes
- 3. Resources:** A lodge needs to identify the important resources it will need for change. Which of the following is most or least representative of your lodge?
  - 5 4 3 2 1 Lodge has significant financial resources on hand
  - 5 4 3 2 1 Lodge will have to raise dues or find the funds to support programs
  - 5 4 3 2 1 Lodge has tried to raise dues and failed
  - 5 4 3 2 1 Lodge cannot survive if dues are raised
- 4. Leadership:** Leadership is the key to planning. Planning is key to leadership. Before you can begin to develop your plan, evaluate each of the following. (A “5” means most representative of your lodge).
  - 5 4 3 2 1 Lodge is unable to control the quality of lodge leaders
  - 5 4 3 2 1 Lodge is aware of the need for leadership development
  - 5 4 3 2 1 Lodge leaders usually bring adequate skills to the “job”
  - 5 4 3 2 1 Lodge leaders have been involved with leadership training
- 5. Relevancy:** A relevant lodge is one that is well-known and understood and involved in the issues of the day. Which of the following best describes your lodge? (5 means most like)
  - 5 4 3 2 1 Lodge is insulated and isolated from the community
  - 5 4 3 2 1 Lodge is well-known among community leaders and members
  - 5 4 3 2 1 Lodge leaders will resist moves towards greater relevancy
  - 5 4 3 2 1 Lodge has seen research on ways to increase acceptance
  - 5 4 3 2 1 Lodge understands which Masonic behaviors contribute to irrelevance

# Worksheet 3

## Discussion Questions

Reference  
Worksheet #2

Use this planning worksheet with *Helping Discover the Needs of Your Lodge*.

As the leaders of your lodge, you have just completed an important evaluation of the needs of your lodge. By examining your answers and responses, you can begin to prioritize where you should develop solutions to the needs you have identified. To help you in this effort, consider the following questions. Use a facilitator if one is available. Come to conclusions on each critical issue.

### Discussion for Question 1

1. If you scored a 5 or 4 on good fellowship, to what do you attribute this result? What will you need to build into your plan to sustain fellowship at this high level?
2. If members are unaware of the need for improved fellowship, how will you increase its importance? Who in your lodge might be responsible for this improvement? How might you keep track of your progress? (see chapter 1 in *101+ Ways to Improve Interest and Attendance in Your Masonic Lodge*.)
3. If you scored high overall, how was this accomplished in your lodge? If you scored low, how will you build increased fellowship into the responsibilities of leadership?

### Discussion for Question 2

1. How would you describe the “focus” of your lodge?
2. If you scored a 5 or 4 on item 1, why is it difficult to score above a 1 or 2 on the remaining items?
3. If you scored a 5 or 4 on the last item, “lodge is committed to change,” why is it also difficult to score above a 1 or 2 on the question concerning the lodge’s intention to maintain the status quo?

### Discussion for Question 3

1. Although financial resources are the only resource mentioned, describe how difficult it will be for your lodge to increase its overall support from members?
2. How will the need for financial support impact your planning process?
3. If you scored a 5 or 4 on the fourth item, “Lodge cannot survive if dues are raised,” how can you still engage in the planning process? What role might planning have if there is insufficient financial strength? Why is planning even more important in this case?

### Discussion for Question 4

1. If you scored a 5 or 4 on the initial item, what special sub-committee might be needed?
2. If you scored a 5 or 4 on the third item, discuss how this was accomplished. Determine the importance of being able to sustain this in the future.
3. If you have consistently scored high as a lodge involved in leadership training, why must this remain an integral part of your plan for the year?

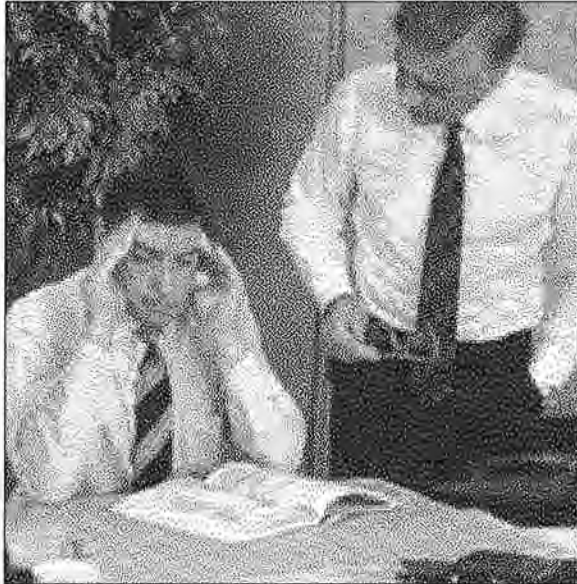
### Discussion for Question 5

1. If you determined your lodge is insulated (a score of 5 or 4), list the specific benefits of becoming more outgoing and relevant?
2. If the lodge is well-known (5 or 4), list the specific benefits. How can a lodge be well-known in a negative manner?
3. If you determined that leadership will resist moves to increase relevancy, how will that information be used in the planning process? If this happens, what is your obligation as a leader?
4. If your lodge has not seen the research (a 1 or 2), then what might one of your action plans become?
5. The last item is very difficult. If your answer was a 5 or a 1, you have many things to discuss. If a five, how has your increased “understanding” been influential in creating greater awareness? If your response was a 1 or 2, meaning your lodge “does not understand the importance of relevance,” what actions will need to be built into your action plans?

# Worksheet 4

## The Case of the Woeful Master

Reference  
Defining Goals and  
Objectives  
Page 9



The recently installed Master of Mt. Able Lodge was full of good ideas. He had been talking for the past six months about "his" year and what he hoped to accomplish.

"I'm really going to make some things happen," he said. "No more wishing things were different. I'm going to make sure lots of things happen."

Immediately after his installation, he called a meeting of his officers to 'lay down the law.'

"I have a ten-point plan for this lodge I want to go over with you," he said. "If you agree with what I am suggesting, we can put this into effect starting immediately. By completing these ten actions, we can really turn this lodge around and make things happen in Mt. Able."

The men listened carefully but quietly. When he had finished, one of the youngest said, "Well, Worshipful, exactly what do you have in mind?"

"What I have in mind is what I've already told you. These ten points..." and he rattled off several. "Membership, ritual, visitations, demits, suspensions and ladies night."

"But Worshipful," the younger man said, "those are just words. You said you had a plan you wanted us to implement. What exactly do you want to accomplish this year?"

"I don't see how you can ask that question," the Master replied. "I just gave you my ten points. What more do you expect?"

**After you have read this case as a group, please consider the following discussion questions:**

1. The incoming Master's intentions appear to be good. Where did he make his first "mistake"?
2. We often hear of a ten-point plan. What problems do you think his plan will run into from the very beginning?
3. His ten points – he called them actions – included all of the right ideas: "membership, visitations, ritual..." What was wrong with the way in which they were presented?
4. This appears to be a perfect time for team building. If the master had determined this was his first important goal, how might he have begun the team building process?
5. Consider the following: The leader of the organization must be "elected" if he is to be effective – even if he won the majority on the ballot. What could this Master do to ensure that he was the "elected" leader and how would the result be different?
6. Given the Master's lack of experience, what might the next step be?
7. If this happened in "our" lodge, what would we do?

# Worksheet 5: Determining the Needs of the Organization

Reference

Step 1

Page 14

The identification of the needs or problems facing the lodge must be carefully defined, the supporting facts stated, and agreement among the leadership (and membership) noted. Use the outline below as an example of how you can use this form.

Description of Needs	Facts that Support	Agreed to By (individual name)
<p>(an example)</p> <p>The lodge needs to attract more youthful members. By doing so, the programs of the lodge can be better supported, financial support is increased and the energy of the lodge will be improved.</p>	<p>80% of active members are over 65. Only two new members were under 50. Lodges with youthful, active members have better programs and more interest. Youthful members are better able to pay. Younger men want opportunity to lead.</p>	<p>Entire planning team A. Boarders D. Wills B. Davis E. Mannor</p>
<p>Your turn</p> <p><b>Description of Needs</b></p>	<p><b>Facts that Support</b></p>	<p><b>Agreed to By</b> (individual name)</p>

# Worksheet 6

## Developing Priorities for Your Lodge

Reference  
Step 2  
Page 21

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

Reasons why this needs to be undertaken first

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Specific benefit to members

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### Priority #2

Reasons why this needs to be undertaken second

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Specific benefit to members

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### Priority #3

Reasons why this needs to be undertaken next

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Specific benefit to members

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### Priority #4

Reasons why this needs to be undertaken next

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Specific benefit to members

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# Worksheet 7

## Developing Goals for Your Lodge

Reference  
Step 3  
Page 26

On this page, first list the prioritized needs you developed for your lodge. Then develop your goals for each prioritized need. When you have finished, use the Goal Assessment (Worksheet #8) to evaluate your progress.

Priority Needs	Goals

# Worksheet 8

## Goal Assessment Activity

Reference  
Worksheet #7

This worksheet is designed to help you evaluate the goals you have developed using Worksheet #7. Hopefully, you will not need to make many adjustments. However, it is better to use this assessment and make certain minor adjustments than to go to the next step of the planning guide and become frustrated and have to backtrack.

**Answer each of these questions in writing or use them as discussion points with your planning team.**

1. How will accomplishing each goal result in a solution for each prioritized need? How will achieving the goal contribute to solving the problem? If it does not, reconsider the goal, not the priority.
2. In light of all of the goals you have developed for the year, have you identified the real needs for your lodge? Have you also prioritized them in a most important to least important manner? If not, on what basis will you make a change in either the need or the priority?
3. Some of your goals will have a completion date of one year or less from the beginning of the new operational year. Is this too ambitious? Which have deadlines that are several years away? What problems will this present your organization? How will you solve the problems presented by the lack of continuity of leadership?
4. Lodge plans are usually more successful if you try to make progress in "chewable bites." That means that trying to accomplish too much, and failing, is nearly as bad as not trying at all. How can you be sure that, with the resources you have available, you can follow this "chewable bites" tactic?



# Worksheet 9

## Case - Davis Variety Store

Reference

Step 4

Page 30



**M**y grandfather started the Davis Variety Store before WWII. He had nurtured it and built it up until it was one of the most important landmarks in Lincoln, Nebraska. I can remember him standing by the door greeting people by name as they passed by on the sidewalk, and I was not surprised that most came into the store to shop for something. As a variety store, it had a little of everything, all brightly displayed and tended by several clerks that had worked for my grandfather for years. There were cameras, tools, toys, magazines, clothes, shoes and sporting goods. I remember best of all the soda fountain where you could get a piece of pie or a real ice-cream soda.

I went away to college, and while I was there, my grandfather passed away. The store was left to the family to run. When I returned home four years later, I went to the store and was astonished at what I found.

First, there was no one standing by the door, and no one was in the store shopping. The three sales clerks were huddled in the back of the store talking. The merchandise looked dim and was not well displayed. I saw that the tennis shoes were cheap and long out of style. Even the soda fountain was gone, taken out and replaced by tapes and CD's – although there was a record supermarket right across the street.

Even though four years had passed, and the concept of a variety store seemed out of context, I did know that WalMart had opened several huge stores successfully, including one about 15 miles from our family store.

I learned from my mother that my grandfather had wanted the store to be mine, and she had been helping out until I came home. At the end of the first week, I decided to consider my options. They seemed pretty clear.

1. I could sell the merchandise at a "going-out-of-business sale" and close the store.
2. I could step in and try my best to make a go of it.
3. I could do nothing and let things take their course.

*What was I to do?*

I remembered some of the things I had learned in college in the business, accounting and management courses I had taken. But would that be enough? Was it worth saving? Was I too young to undertake the process?

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This story or case is about making choices and about Davis Variety Store. You may have experienced something like this in your life. Use the questions on Worksheet 10 to help you arrive at a decision and facilitate a rousing discussion with your planning team.

To develop a discussion around this case, please use the study guide listed on **Worksheet #10**, Choices for Davis Variety Store.

# Choices for Davis Variety Store

It was clear which option my grandfather would have preferred and, not being a quitter, I decided on option 2 – assume the management of the store and try to make a go of it.

In developing my plan, I determined that the store should become a source of high quality, specialty items for use around the home, noted for the care and attention of its customers.

I determined that my number one **prioritized need** was to get the store back into shape so that when customers were attracted, they would be satisfied with what they found. (Some friends said I should advertise first, but I felt it was the wrong time to let people see how bad things had become).

My **first goal** was to have the store ready for a grand opening in 90 days in concert with the Fourth of July celebration that took place in the center of the town where the store was located.

Then I considered what action steps I should take first. Keeping in mind the one goal I have identified, and my number one priority, what action steps, in which sequence should I consider? Use the questions that follow to have a rousing discussion in the lodge.

1. Two choices or options are presented. In light of the prioritized need, which course seems to have the most direct and profound effect?

Choice A: Close the store for 30 days

Throw out old merchandise, fix and paint

Conduct a survey among old customers to determine their needs

Begin team building among employees

Order new goods and properly display

Advertise grand opening with special incentives

Choice B: Replace employees and begin training new hires

Keep store open but fix it up as best as possible

Begin special advertising campaign

Have a special sale

Review new merchandise and place an order

Have grand opening sale

2. What should you do about WalMart? What are your possibilities?
3. Can you make a case for doing research among a group other than old customers?
4. Is there any other strategy besides a "go it alone" strategy?
5. Why might a more effective action plan be to go after new customers rather than trying to renew the old?

Many Masons have seen the comparison of the choices faced by the Davis Variety Store and the decision facing the lodge. Even though you will have to substitute the word members for customers, many of the other conditions are relatively similar.

Discuss with your group: How is this like or unlike our Masonic lodge? What choices will we have to make in order to renew our lodge? How are the store's "older" customers and the older, less active Masons alike or different in their behavior?

# Worksheet 11

## Action Planning Guide

Reproduce and use this worksheet to identify the action steps you develop for each goal for your lodge.

Prioritized Need	Goal to be Met	Action Steps

# Worksheet 12

## Creating the Will to Work

Reference  
Step 5 and  
Appendix B

**In your lodge or Masonic organization, there will be many opportunities for you to put information you have learned about motivation to work. Here is an opportunity for you to get specific.**

This exercise will work best with your planning team or with a team of the leaders of your lodge. The goal of this worksheet is to give your team some specific examples of how a motivational technique works and then have you develop specific plans for your lodge.

Motivational Satisfier	Non-Masonic Application	Application in your Masonic Organization
(an example) Achievement	Workers are given a specific number of tasks to complete	Members of each lodge committee are given specific tasks related to a prioritized need



## Examining a Typical Budget

Your Masonic lodge will be different in many ways from this lodge. Larger or smaller, more or less active. But you can learn a great deal from this budget for a lodge. Below is a budget for a lodge just beginning a renewal effort. Review it carefully and use the questions on Planning Worksheet #15 to discuss your findings.

### A Typical Lodge Budget

Budgets are often made up of line items of income and expenses or disbursements like these identified below. Here is a typical Masonic lodge annual budget. This budget example is based upon 250 members paying \$45 a year.

Anticipated Income	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
Membership dues	\$2000	3000	3500	1500	1250	180	45						\$11475
Petition fees			450			450			450				1350
Refreshments, misc sales	240	250	280	400	300	50	50	50	150	200	350	600	2920
Masonic Homes Endowment	50	100	100	25	10								285
Charity Fund	50	50	50	30	50				50	50	80	80	440
Contributions / special appeals (wills, gifts)			1500				1000		1500	1500	1500		5500
Rental income	800	750	400	200	200	600	50	50	100	200	200	400	3950
Income from investments			1000			1000			1000			1000	4000
Miscellaneous / other	80	90	300	900	900	50	10		100	150	150	150	2880
<b>Total Anticipated Income</b>	<b>\$3220</b>	<b>4240</b>	<b>7580</b>	<b>3055</b>	<b>2710</b>	<b>2330</b>	<b>1155</b>	<b>100</b>	<b>1800</b>	<b>2100</b>	<b>2280</b>	<b>2230</b>	<b>\$32800</b>
<b>Anticipated Disbursements</b>	<b>\$</b>												
Grand Lodge per-capita						1750							\$ 1750
George Washington Memorial	30					15							45
Temple maintenance	300	300	300	300	450	450	300	300	300	300	300	300	3900
Real Estate taxes						2000			2000				4000
Insurance									1500				1500
Utilities	120	140	130	130	95	90	60	60	120	130	130	140	1345
Salaries, Sec'y, Janitor, etc.	130	130	130	130	130	130	1050	130	130	130	130	130	2480
Withholding, social security tax													0
Funeral, hospital expense	25		25		25		25		25		25		150
Telephone	20	24	24	24	24	24	24	24	24	24	24	24	284
Printing and postage	35	35	35	135	35	35	35	0	35	135	35	35	585
Gifts, aprons, PM jewels, installation, etc	300					150							450
Garment cleaning	25					25							50
Travel and entertainment	450	450	450	350	350	250	100	100	450	450	1000	400	4800
Lodge Charity Scholarship	1400			200	1400						100	300	3400
Masonic Home Endowment			350	350	350	100			350	350	600	350	3500
Refreshments	350	350	350	350	350	30	30	30	30	30	30	30	140
Paraphernalia	140												140
Miscellaneous	30	30	30	30	30	30	30	30	30	30	30	30	360
Renewal programs/seminar		250			500				250				1000
<b>Total Anticipated Disbursements</b>	<b>\$3355</b>	<b>1709</b>	<b>1474</b>	<b>1649</b>	<b>3389</b>	<b>5049</b>	<b>1624</b>	<b>644</b>	<b>3464</b>	<b>3299</b>	<b>2374</b>	<b>1994</b>	<b>\$30024</b>
Total Income less													
Total Anticipated Disbursements	\$ <135>	2531	6106	1406	<679>	<2719>	<469>	<544>	<1664>	<1199>	<94>	236	\$ 2776

# Worksheet 15

## Discussing the Annual Budget

Reference  
Step 6  
Page 39

Use the information on the budget presented on Worksheet #14 to answer the following questions. Use these materials with your planning team and get lots of opinions on what you have discovered.

1. How does the flow of revenues, income, compare or correspond to the outflow of expenses or disbursements?
2. What options will the lodge have if the flow of income is delayed, but will eventually "catch up" with expenses?
3. Some members of the lodge might have liked to begin leadership development earlier, why was this difficult from a budgeting viewpoint?
4. When a lodge has insufficient money from continuing operations, what other alternatives might it have?
5. If you were presented this budget at the same time you were presented the plan for approval, and if you were interested in helping renew the lodge, where are there areas in which you might save additional money?
6. A budget does show you that you may need to secure additional funds. It does not suggest how. What are the possible ways which your organization can raise the additional funds required to put your plan of action into effect?

# Worksheet 16

## Developing a Budget for Your Lodge or Masonic Organization

Reference

Step 6

Page 39

Using this page, the action plans you have developed, and the records of your lodge's expenses for the prior year, develop a budget for your lodge's next fiscal year. If a category does not fit, delete it and add the more appropriate line item. You may want to make copies of this form or, better yet, put the data into the computer so you can work with the document and not have to create an original each time.

<b>Anticipated Income</b>	<b>Total For Year</b>
Membership dues	\$
Petition fees	
Refreshments, misc sales	
Masonic Homes Endowment	
Lodge Charity Fund	
Contributions / special appeals	
Rental income	
Income from investments	
Miscellaneous / other	
<b>Total Anticipated Income</b>	<b>\$</b>
<b>Anticipated Disbursements</b>	
Grand Lodge per-capita	\$
George Washington Memorial	
Temple maintenance	
Real Estate taxes	
Insurance	
Utilities	
Salaries, Sec'y, Janitor, etc.	
Withholding, social security tax	
Funeral, hospital expense	
Telephone	
Printing and postage	
Gifts, aprons, PM jewels, installation, et.c	
Garment cleaning	
Travel and entertainment	
Lodge Charity Scholarship	
Masonic Home Endowment	
Refreshments	
Paraphernalia	
Miscellaneous	
Renewal programs/seminar	
<b>Total Anticipated Disbursements</b>	<b>\$</b>
<b>Total Income less Total Disbursements</b>	<b>\$</b>



## Determining How Costs Should be Budgeted for 12 Months

Now that you have the total costs for each line item, determine how these costs will occur during each month of the year. By doing so, you will be better equipped to manage the available cash resources in your lodge or Masonic organization.

Anticipated Income	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
Membership dues	\$												\$
Petition fees													
Refreshments, misc sales													
Masonic Homes Endowment Charity Fund													
Contributions / special appeals (wills, gifts)													
Rental income													
Income from investments													
Miscellaneous / other													
<b>Total Anticipated Income</b>	\$												\$
<b>Anticipated Disbursements</b>	\$												\$
Grand Lodge per-capita													
George Washington Memorial													
Temple maintenance													
Real Estate taxes													
Insurance													
Utilities													
Salaries, Sec'y, Janitor, etc.													
Withholding, social security tax													
Funeral, hospital expense													
Telephone													
Printing and postage													
Gifts, aprons, PM jewels, installation, etc													
Garment cleaning													
Travel and entertainment													
Lodge Charity Scholarship													
Masonic Home Endowment													
Refreshments													
Paraphernalia													
Miscellaneous													
Renewal programs/seminar													
<b>Total Anticipated Disbursements</b>	\$												\$
<b>Total Income less</b>													
<b>Total Anticipated Disbursements</b>	\$												\$

# Worksheet 19

## Progress Assessment and Reporting Form

Reference  
Step 7  
Page 42

**Date of Report:**

**Reported By:**

Use this form to capture the progress of your action teams by summarizing reports they have made. Distribute as required.

<b>Priority/Goal</b>	<b>Action Step</b>	<b>Progress to Date</b> (effective ___ )	<b>Action Pending</b> (next ___ days)
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