

Subordinate Lodge Officer Training Course



Masonic District 1B

Grand Lodge of Virginia, A.F.& A.M.

Presented by Wor. Peter E. Terrill, DEO

Purpose of this training...



- ▶ This training course will fulfill the requirement outlined in Executive Order No. 1 (2012) from the Grand Master
- ▶ This course has incorporated materials from the following sources:
 - *District Education Officers' Manual for Training of Subordinate Lodge Officers* from the Grand Lodge of Virginia
 - *A Guide for Planning Your Year as Worshipful Master* from the Grand Lodge of Virginia
 - “*Lodge Officer Training*” briefing (2008) by RW Matt Szramoski
 - “*Running the Masonic Lodge from a Business Viewpoint*” briefing (2006) (author unk.)

Training Course Outline



▶ **Module I: Planning and Developing Your Programs and Activities**

- Lesson 1: *The Importance of Lodge Planning*
- Lesson 2: *Setting Lodge Objectives and Goals*
- Lesson 3: *Developing a Lodge Action Plan*
- Lesson 4: *Developing a Lodge Calendar*
- Lesson 5: *Developing a Lodge Budget*

▶ **Module II: Running the Lodge**

- Lesson 1: *Lodge Operation & Management*
- Lesson 2: *Lodge Administration*
- Lesson 3: *Lodge Laws, Rules & Regulations*
- Lesson 4: *Lodge Finance*

▶ **Module III: Building Lodge Leadership**

- Lesson 1: *Creating a Strong Line of Officers*
- Lesson 2: *Creating Effective Committees*
- Lesson 3: *Grand Lodge & District Resources*

▶ **Module IV: Developing and Implementing Your Membership Goals**

- Lesson 1: *The Importance of Membership Retention*
- Lesson 2: *The LMIP Program*
- Lesson 3: *Masonic Education*
- Lesson 4: *Educating Non-Masons About the Fraternity*



MODULE I

Planning and Developing Your Programs and Activities

Module Objective:

- As a result of your participation in this module, you will be able to create an overall plan of action, calendar, and budget for your year as Worshipful Master



Lesson 1

The Importance of Lodge Planning

Learning Objectives:

- Understand the importance of Lodge planning
- Understand the planning process

What is Planning?



Planning: Function: *noun*: the act or process of making or carrying out plans:
specifically: the establishment of goals, policies and procedures for a social
or economic unit.

The Importance of Planning for Your Lodge...



Lodges that fail to plan exhibit:

- A decline in attendance
- Less petitions
- Difficulty in recruiting officers
- Poor communication
- Disgruntled members
- Financial concerns

Lodges that actively plan exhibit:

- Increased attendance
- Receive more petitions
- Competitive officer elections
- Good communication
- Satisfied members
- Strong finances

Principles of Planning



- ▶ Make Your Plan
- ▶ Execute Your Plan
- ▶ Evaluate Your Plan

The Different Steps in the Planning Process...



1. Brainstorm long-term objectives for your Lodge
 - Where do you want your Lodge to be in 5 years?
 - Example: Establish an effective program to retain members

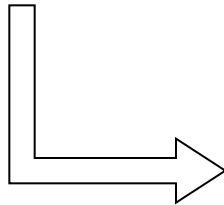
2. Develop realistic goals to support your objectives
 - Which goals will be achievable in 1-2 years?
 - Example: Increase the appeal of the Lodge through a series of events and planned programs

3. Create an action plan to meet your goals in your Masonic year
 - What concrete action can you take this year?
 - Example: Hold several family/social events throughout the year

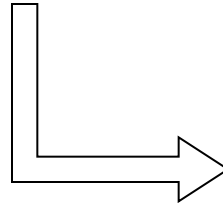
The Planning Process Cascade...



Objectives (usually long-term)



Goals (can be short or long-term)



Actions (short-term)

Objectives...followed by Goals...followed by Actions



Lesson 2

Setting Lodge Objectives and Goals

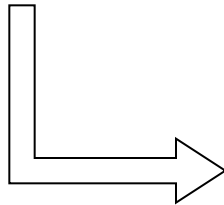
Learning Objectives:

- Understand how to define long-term objectives for your Lodge
- Understand how to set achievable goals for your Lodge that support your objectives

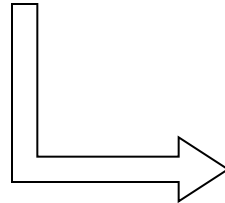
The Planning Process Cascade...Objectives



Objectives (usually long-term)



Goals (can be short or long-term)



Actions (short-term)

First, let's think about some objectives for your Lodge...



What does your ideal Lodge look like?

- ▶ Positive change in membership?
- ▶ Reputation for good ritual?
- ▶ Variety of activities for all members?
- ▶ Well-attended meetings?
- ▶ Sustainable Lodge budget?

- ▶ Or, all of the above?!



Ask not what your Lodge can do for you...

...ask what can you do for your Lodge!

- ▶ Start the process by asking a series of critical questions:
 - What are my Lodge's strengths/weaknesses?
 - Does my Lodge have longstanding negative trends that need to be corrected?
 - How can I strengthen my Lodge for the benefit of its Members?
 - How can I strengthen my Lodge for the benefit of my successors in the East?
- ▶ Use your Past Masters to help brainstorm the answers to these questions

**Identify areas for improvement in the Lodge and build
your objectives around them!**

Critical questions to ask your Past Masters...



▶ Administration

- Is attendance declining at Lodge meetings and events? Is membership stable or declining?
- Is the progressive line stable, and do I know what the line will look like next year?
- Are there active Past Masters to advise and assist?
- Are revenues over expenses remaining stable?

▶ Ritual

- Can the Lodge confer all three degrees, including the lectures?
- Do the officers show up for ritual practices? Is there an active LIW?

▶ Education and Fraternal Relations

- Does the Lodge have regular Masonic education programs? Is there an active LEO?
- Does the Lodge make Fraternal Visits to other Lodges?

▶ Family, Community, and Charity

- Does the Lodge engage in blood drives, child ID, Community Builders Awards, etc?
- Does the Lodge have events for family members?

Here are some examples of reasonable Lodge objectives.



- ▶ Administrative:
 - Establish an effective program to attract and retain members

- ▶ Ritual:
 - Develop a reputation in the District for excellence in ritual

- ▶ Education and Fraternal Relations:
 - Institute a comprehensive program of Masonic education in the Lodge

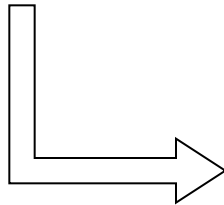
- ▶ Family, Community, and Charity:
 - Strengthen the ties between the Lodge and the local community

When looking at your objectives, keep it high-level!

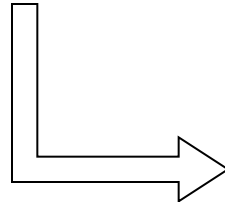
The Planning Process Cascade...Goals



Objectives (usually long-term)



Goals (can be short or long-term)



Actions (short-term)

Now, let's develop some goals based on your objectives...



What goals are short-term versus long?

Short-Term (1 year or less):

Tactical: Function: *adjective*: made or carried out with only a limited or immediate end in view : adroit in planning or maneuvering to accomplish a purpose

Long-Term (5 years or more):

Strategic: Function: *adjective*: of, relating to, or marked by strategy <a *strategic* retreat>: necessary to or important in the initiation, conduct, or completion of a strategic plan : of great importance within an integrated whole or to a planned effect <emphasized *strategic* points>

Your goals can be short-term or long-term, but most will likely fall somewhere in between



Here are some examples of achievable goals:

- ▶ Each objective should have at least one goal, and will likely have more than one
- ▶ Objective: Establish an effective program to attract and retain members
 - Goal: Increase the general interest in Freemasonry among non-Masons
- ▶ Objective: Develop a reputation in the District for excellence in ritual
 - Goal: Develop a program for regular instruction of ritual in the Lodge
- ▶ Objective: Institute a comprehensive program of Masonic education in the Lodge
 - Goal: Plan a Lodge officer training program
- ▶ Objective: Strengthen the ties between the Lodge and the broader community
 - Goal: Plan a series of family and community-focused events

Your goals should be tangible, achievable, and based on your objectives



Lesson 3

Developing a Lodge Action Plan

Learning Objectives:

- Understand the importance of having a Lodge action plan
- Know how to develop an action plan to support your Lodge goals

Action Plan Benefits

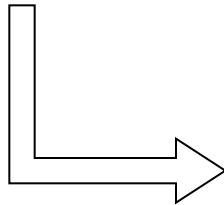


- ▶ Increased attendance at stated and called communications
- ▶ Decrease in the number of members suspended for Non-Payment of Dues (NPD)
- ▶ Increase the number of family activities sponsored by the lodge
- ▶ Improving communication with Masonic Widows
- ▶ Holding monthly officer meetings to improve communication
- ▶ Increasing the number of Life Member's in Perpetuity (LMIP)

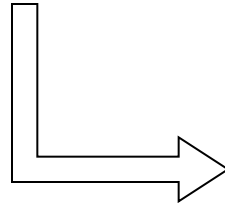
The Planning Process Cascade...Actions



Objectives (usually long-term)



Goals (can be short or long-term)



Actions (short-term)

Now, let's create actions based on your goals...



Example Actions: Lodge Administration

A. Membership

- ▶ Appoint a Membership Committee to create a plan for member retention
- ▶ Call all members with 2 years' dues unpaid
- ▶ Raise at least six new members during the year

B. Communication

- ▶ Mail or email trestleboards 5 business days prior to the start of the month
- ▶ Post a 90-day calendar of events posted in the Lodge
- ▶ Distribute wallet cards with all officers, representatives, and committee chairs' contact info
- ▶ Share action plan with all officers
- ▶ Send reminder emails to members prior to all Lodge functions
- ▶ Update the lodge website with current year's information
- ▶ Create a Lodge listserv to send out messages to membership

Example Actions: Lodge Administration (cont.)



C. Fraternal Relations

- ▶ Develop a Masonic education program to deliver during Fraternal visits
- ▶ Plan the year's Fraternal visits at beginning of year
- ▶ Make petitions available for all Members
- ▶ Publicize and hold a Wardens' night and invite all district Lodges
- ▶ Hold a table lodge and invite other Lodges in district

D. Meetings

- ▶ Regular monthly schedule of called communications, ritual school, etc.
- ▶ Start all meetings on time at 7:30 pm
- ▶ Plan each stated communication with a set agenda and an education program
- ▶ Empower the LIW to ensure accuracy of ritual during meetings

Example Actions: Lodge Administration (cont.)



E. Planning

- ▶ Form a Master's Advisory Council of Past Masters
- ▶ Hold monthly officers' meetings
- ▶ Form a Strategic Planning Committee to create a long-range lodge plan

F. Refreshment

- ▶ Establish Stewards' Committee to plan and prepare food at meetings
- ▶ Serve dinner at every stated meeting
- ▶ Serve light snacks at every called communication

G. Building and Grounds

- ▶ Hire a property manager/handyman for minor maintenance
- ▶ Schedule lodge clean-up days to organize closets and office
- ▶ Establish capital improvement fund

Example Actions: Lodge Administration (cont.)



G. Morale and Brotherly Love

- ▶ Hold a Past Masters' night with dinner to honor PMs
- ▶ Track new candidates and maintain regular contact through mentors
- ▶ Have name badges made for all new members
- ▶ Hold rusty nail session for infrequent attendees
- ▶ Recognize Masonic birthdays and veterans' anniversaries
- ▶ Include Masonic widows in special events



Example Actions: Ritual

A. School of Instruction

- ▶ Establish a set schedule for ritual schools
- ▶ Assign assistant officers where possible as backups for installed officers
- ▶ Identify and increase number of catechism instructors
- ▶ Senior Warden will earn Wardens' certificate by July

B. DIW School

- ▶ All officers will attend monthly DIW School

C. William H. Wood School

- ▶ All line officers and LIW expected to attend

D. R.J. Simmons School

- ▶ Strongly encouraged for all line officers
- ▶ Lodge will pay for gas and ½ of lodging expenses



Example Actions: Ritual (cont.)

E. Degree Lectures and Charges

- ▶ Assign select members to learn lectures/charges

F. Degree Conferral and Charges

- ▶ Casts assembled in advance by Senior Deacon, Junior Warden, and Senior Warden, respectively

G. Master Mason Degree

- ▶ ID and train additional 2nd section cast members
- ▶ All MM Degree 2nd sections will be in full costume
- ▶ Hold special workshops several times per year for MM degree to train cast participants
- ▶ Cast selected 24-hours prior to Degree or it will be rescheduled



Example Actions: Education

A. Stated Meeting Education Programs

- ▶ Arrange a featured speaker at each communication
- ▶ Provide a reading from Methodical Digest by line officers
- ▶ Assign LEO to present programs regularly

B. Library

- ▶ Clean up and organize library
- ▶ Establish books program for expanding library
- ▶ Appoint lodge librarian

C. DEO Seminars

- ▶ Lodge officers attend all sessions when held



Example Actions: Education (cont.)

D. Leadership Conferences

- ▶ All line officers and LEO attend

E. Mentoring Program

- ▶ Establish a robust program to educate new members
- ▶ Provide each new member a POC

F. Officer Training

- ▶ Leadership correspondence courses required for all officers – lodge will support cost
- ▶ Provide binders for all line officers outlining duties, bylaws, and other pertinent information

Example Actions: Charity, Family and Community



A. MAHOVA

- ▶ MAHOVA brochures available in the lodge
- ▶ Provide a Founder's Day donation from the lodge

B. Child ID

- ▶ VACHIP brochures available in the lodge
- ▶ Schedule at least one event in the year

C. Blood Program

- ▶ Brochures available in the lodge
- ▶ Lodge members donate at least 80 units in the year
- ▶ Earn the Levy Award

D. Community

- ▶ Present at least one Community Builder's Award
- ▶ Sponsor a youth sports team
- ▶ Award at least one lodge scholarship

Example Actions: Charity, Family and Community (cont.)



E. Youth

- ▶ Feature a Youth Night as a program at a stated meeting
- ▶ Appoint a Lodge Youth Rep to report on activities
- ▶ Make a group visit to a Masonic youth group meeting
- ▶ Sponsor a youth group in Lodge

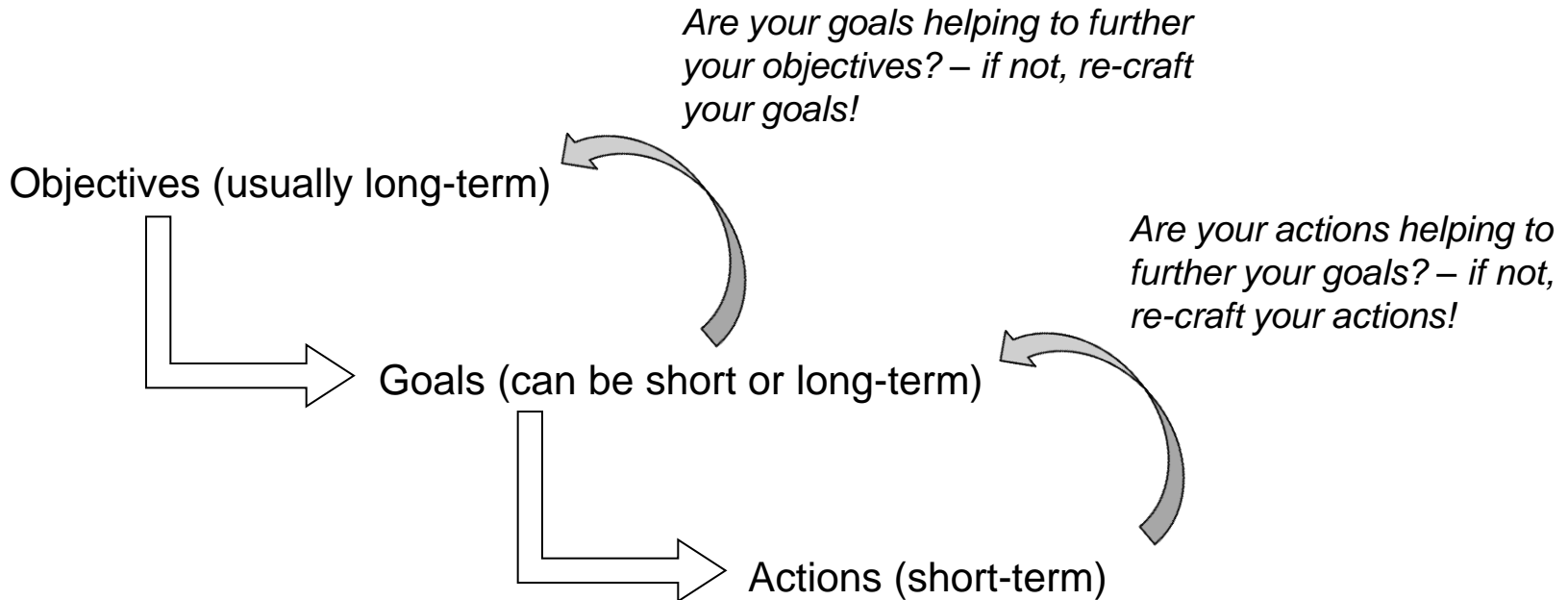
F. Family Events

- ▶ Hold a Ladies' Night event in May
- ▶ Hold a Family Picnic/BBQ in August
- ▶ Hold holiday pancake breakfasts (Presidents' Day and Veterans' Day)

G. Charity

- ▶ Donate to and support the Masonic benefit fund
- ▶ Sponsor needy local families during the Holidays

Measurability: Are we meeting our goals and objectives?



Periodic evaluation of your progress towards meeting your goals and objectives is essential. Remember: make your plan, execute your plan, and evaluate your plan.



Lesson 4

Developing a Lodge Calendar

Learning Objectives:

- Understand the components that make up a Lodge calendar
- Know how to create a basic annual Lodge calendar



Why is Lodge calendar planning important?

- ▶ Communicate activities to the membership
- ▶ Ensure the Lodge facilities are available
- ▶ Obtain quality speakers and confirm their attendance
- ▶ Allow time to promote the program activity to the Lodge membership
- ▶ Reduce stress among officers with last minute changes/emergencies
- ▶ Delegate responsibilities
- ▶ Adequately budget for the activities of the Lodge

Considerations for building a Lodge calendar...



- ▶ The dates of your stated meetings are proscribed by your bylaws and the Grand Lodge's Annual Communication is proscribed by Virginia Masonic law, i.e., the dates are eminently predictable
- ▶ The monthly DIW schools and the Official Visit of the GM will be scheduled at the beginning of each year (hopefully)
- ▶ Avoid conflicts with other large Masonic events – no one may show up!
- ▶ Balance your Lodge's activities across the year and across each month – don't kill your officers
- ▶ Availability of speakers at stated communications
- ▶ Inclusion of social and family events and Bring-A-Friend programs
- ▶ Other District and Grand Lodge activities

Start with a good calendar template...



- ▶ Find a full-year calendar template online that has a 1 page per month format
 - I use: <http://www.vertex42.com/ExcelTemplates/yearly-calendar.html>
- ▶ The file is in Excel and I can add/edit text for each day

JANUARY 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday																																																																																		
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Step 1: Lodge/District obligatory events

- ▶ The monthly Stated Communications for your Lodge
- ▶ The monthly Stated Communications for other Lodges in District 1B
 - Elmer Timberman #54: 3rd Monday – except December (1st Monday)
 - Springfield #217: 1st Tuesday
 - Mt. Vernon #219: 1st Wednesday
 - Occoquan #310: 2nd Monday
 - Dale City #319: 3rd Friday – except December (1st Friday)
 - John A. LeJeune #350: 3rd Monday – except December (2nd Monday)
 - Ft. Hunt-Skidmore #353: 2nd Wednesday
- ▶ The Grand Annual Communication (the Friday preceding the 2nd Monday in November)
- ▶ The planned Installation of Officers for the Lodges in your District (you should know this by ~mid-November)

Step 2: Add District/Division mandatory events



- ▶ Monthly DIW Ritual Schools (typically 4th Wednesday in District 1B)
- ▶ Annual Division Leadership Conference (usually in March or April)
- ▶ Annual Area Ritual School (William Hiram Wood School – usually in April or May)
- ▶ The Official Visit of the Grand Master to the District (based on GM calendar)
- ▶ District Masters' & Wardens' Association meetings (every other month before the DIW Ritual School)
- ▶ Non-mandatory events:
 - Reid J. Simmons Academy (usually last week of July/first week of August)



Step 3: Add Appendent Body events

- ▶ Royal Arch
 - Arlington #35: 2nd Wednesday – except February (1st Wednesday)
 - Alexandria #77: 3rd Wednesday
 - Royal Arch Grand Convocation (the weekend after Grand Lodge)
 - Provisional Past Masters' Degree (look for announcements later in your year) – make sure your Wardens know!

- ▶ Knights Templar (Commandery)
 - Old Dominion #11: 4th Wednesday
 - Arlington #29: 3rd Friday
 - Grand Commandery (Thu-Sat of the 1st week in May)

- ▶ Scottish Rite
 - Alexandria: 2nd Friday
 - Reunions (3rd and 4th Saturdays in April and October)
 - Alexandria Blue Lodge Night (usually a Saturday in August)

Step 4: Add your Lodge's other meetings and events



▶ Called Communications

- Most Lodges have around one Called Communication a month
- Pick a set day of the month for planning purposes

Example: if your Lodge's stated meetings are held on the 1st Wednesday, block off the 2nd or 3rd Wednesday each month for your Called Communications

▶ Lodge Ritual Schools

- Most Lodges hold these on a set day each week

▶ Officers' Meetings

- Holding these every other month is usually sufficient
- Pick a week that doesn't have any other Lodge events, if possible



Step 5: Add your Lodge's special events

- ▶ Fraternal Visits to Other Lodges
 - Try to plan at least 3 throughout the year; 5 or more is even better
- ▶ Social Events
 - The next slide has some ideas
- ▶ Bring a Friend Nights
 - The Grand Lodge Membership Committee is a resource for planning and holding a Bring a Friend program
- ▶ Visits to Masonic Youth Groups
 - When do they meet? When are their installations?
 - DeMolay; Rainbow for Girls, Job's Daughters – pick a group, and show up!

Some Social Event Ideas



- ▶ Have a Casual Dress Night (Ties to be cut off at the door by the Tiler)
- ▶ “Get to know our Lodge” Night...for the families...for the local community?
- ▶ Family dinners before the stated meeting
- ▶ Meeting programs with non-Masonic speakers (“go to refreshment”)
- ▶ Day at a local park (make sure you have some activities for all ages)
- ▶ Night Out for Adults
- ▶ Share Hobbies (bowling, boating, volleyball, pistol range, . . .)
- ▶ Pizza and Movie Night (a good laptop with DVD, and projector)
- ▶ Dress alike night...see what happens when husbands and wives or members and their girl friends try to match each other..
- ▶ Family Pet Day...bring your pets to Lodge (or the parking lot)
- ▶ Arrange for a group tour of the GW Masonic Memorial
- ▶ Arrange for a group tour of a non-Masonic place (ex. Gunston Hall)

Step 6: Now, Plan Each of Your Stated Communications...



- ▶ Before January 1st of your year in the East, coordinate these dates:
 - Official visit of the District Deputy Grand Master
 - Planned visit of the District Masonic Home Ambassador
 - Planned visit of the District Blood Coordinator
 - Planned visit of the District Instructor of Work
 - Planned visit of the District Education Officer

- ▶ Additionally, you'll need to plan these into your Stateds:
 - Founder's Day Program (October)
 - Discussion of the annual Grand Lodge Resolutions (October)
 - Presentation of the Audit Report (December)
 - Election of Officers (December)



And, about those Stated Communications...

Agenda template for Stated Communications...

1. Opening
2. Pledge of Allegiance
3. Secretary's Report
4. Treasurer's Report
5. Masonic Birthdays
6. Sick and Distressed Report
7. Committee Reports
8. Other New Items of Business
9. Introductions
10. Masonic Education Program
11. Featured Speaker
12. Reading of the Minutes
13. Closing

Arranging Speakers for your Stated Communications...



- ▶ Your Stated Communications should try to include:
 - An education program
 - Have the LEO or other Brother assemble a series of short talks
 - A featured speaker
 - Can be masonic or non-Masonc

- ▶ Ideas for non-Masonic speakers:
 - Retirement planning
 - Home security
 - Men's health
 - Local history
 - Insurance
 - Gardening
 - And more...the topic is only limited by your creativity and the Lodge's interests!



When Inviting a Speaker...

- ▶ Make the request in writing at least 60 days in advance, earlier if possible
- ▶ Include the date, time, if a meal will be served, length of presentation, etc.
- ▶ Clearly communicate your expectations as to what you want them to cover and how long to speak
- ▶ Ensure there is a point of contact for the speaker who will check if there are any special requirements (i.e., a PowerPoint presentation or DVD player) and who will provide clear directions to the Lodge and will also greet and stay with your speaker.
- ▶ Call or E-mail the speaker 2 weeks before the presentation to confirm. Contact them again the week of the communication/activity.
- ▶ Have a back-up plan for the unexpected emergency. For example, plan now to have a talk or speaker held in reserve in case a scheduled speaker fails to appear.



Lesson 5

Developing a Lodge Budget

Learning Objectives:

- Understand the importance of budgeting to your Lodge
- Understand the relationship between income and expenses
- Know how to develop a Lodge budget to support your plan



Lodges that do not have a budget will often see:

- ▶ Temple/lodge hall is poorly maintained
- ▶ Poor communications (no trestleboard)
- ▶ Difficulty in paying utility bills
- ▶ Inability to assist brethren/widows in need
- ▶ Reduction in social/recreational activities that incur costs

Lodges that do have a budget usually have:



- ▶ Well-maintained temple/lodge hall
- ▶ Resources to mail the trestleboard to all members/widows
- ▶ Ability to pay for all normal utility bills
- ▶ Funding to subsidize social/recreational activities
- ▶ Income to support brethren/widows in financial need

Principles of Lodge Budgeting



- ▶ Expenses should typically not exceed income
 - Exception might be for use of Lodge savings for capital improvements
- ▶ An emergency fund should be maintained (for losses not covered by insurance, brethren in distress, etc.)
 - Some Lodges' bylaws or standing resolutions make provision for an emergency or capital improvement fund
- ▶ Degree fees/dues may be adjusted, at a minimum, to compensate for inflation
 - Virginia Masonic Law allows automatic adjustment for inflation each year if a Lodge's bylaws specify it
- ▶ Long-term investments to improve the lodge's financial strength (such as the *Life Membership in Perpetuity* program) should be promoted and planned for
- ▶ Planning for any activity should include consideration of the budget
- ▶ The lodge should consider soliciting donations for special projects/expenses



Most Likely Revenue Sources

- ▶ Annual Dues (For some Lodges, this is the main part of their revenue)
- ▶ Degree Fees and Affiliations
- ▶ LMIP/MLMIP Program
- ▶ Building Use (Renting the Lodge)
- ▶ Interest on Investments
- ▶ Miscellaneous “Money Making” Events and Fundraising Activities (Key words. . . Non-Profit and Methodical Digest guidance)
- ▶ Donations/Gifts

Most Likely Expense Sources



- ▶ Grand Lodge Assessment
- ▶ Utilities
- ▶ Building Maintenance
- ▶ Compensation of Officers
- ▶ Travel to Grand Annual Communication
- ▶ Stewards' Fund (all meetings and special events)
- ▶ Supplies and Regalia
- ▶ Insurance
- ▶ Donations (to MAHOVA, youth groups, charity, etc.)
- ▶ Scholarships
- ▶ Printing and Postage (Trestleboards, etc.)

Steps for building a Lodge budget:



- ▶ Meet with your Lodge Secretary and Treasurer
 - Get a copy of the Lodge's most recent audit report
 - Make sure you can understand what was spent in each of the categories on the previous slide
 - Get a copy of the last Grand Lodge assessment
 - Ask the Secretary for an estimate of the upcoming year's dues to be collected
- ▶ Ask your prospective Committee Chairs to estimate the costs of special events within their purview – review these estimates against similar events in the past
- ▶ Use a budget template to fill in likely revenues and expenditures

Special Considerations for Your Budget



Make sure to include:

- ▶ Any major building renovation/addition expenses
- ▶ Funding for new activities you are planning that have not been conducted in the previous year
- ▶ Adjustments for decline/growth in membership and resulting dues income
- ▶ Assume a 3-5% increase in utility costs
- ▶ Any significant replacement costs for Lodge paraphernalia/aprons/furniture

Sample Lodge budget:



REVENUES

Dues	12,000.00
Fees for Degrees and Affiliations	1,500.00
LMIP	3,000.00
Building Use	25,000.00
Donations/Gifts	2,000.00
Fund-raising Activities	1,200.00
Interest	300.00
TOTAL REVENUES	55,000.00

EXPENDITURES

Grand Lodge Assessments		7,800.00
Travel & Annual Communication Expenses		600.00
Compensation of Officers		4,000.00
Lodge Scholarship Fund		2,400.00
Steward's Fund		4,000.00
Charity/Gifts/Donations		3,800.00
Trestleboard Printing and Postage		800.00
Insurance		1,200.00
Masonic Supplies and Regalia		1,200.00
Building and Grounds Maintenance		
Maintenance Supplies	1,200.00	
Cleaning Service	7,800.00	
Trash Service	1,000.00	
Maintenance	5,000.00	15,000.00
Utilities		
Electrical	7,000.00	
Gas	3,600.00	
Phone and Internet	1,200.00	
Water and Sewer	2,400.00	14,200.00
TOTAL OPERATING EXPENDITURES		55,000.00

For a balanced budget...



Total Revenue = Total Expenses

- ▶ When revenue exceeds expenses, you have a surplus!
 - What is the best use of a surplus?
 - Can it be used to enhance the Lodge's programs, or is it best set aside for future anticipated expenses?

What happens when expenses exceed revenue?



Deficit:

1 a (1) : deficiency in amount or quality <a *deficit* in rainfall> (2) : a lack or impairment in a functional capacity <cognitive *deficits*> <a hearing *deficit*> b : DISADVANTAGE <scored two runs to overcome a 2-1 *deficit*>

2 a : an excess of expenditure over revenue b : a loss in business operations

Alternative means to prevent a deficit:



- ▶ Brethren who participate in an activity can bear the cost
- ▶ Deposits can be obtained for dinners/special activities. This will reduce the number of “no-shows.”
- ▶ The Lodge can hold more fundraisers to increase revenue
- ▶ The Lodge can examine encouraging wills and bequests from its own members
- ▶ Conduct joint activities with a nearby sister Lodge to split expenses
- ▶ Solicit Lodge members to maintain the grounds/building to eliminate contractor costs
- ▶ Develop a Life Membership in Perpetuity Committee
- ▶ Give “naming rights” to brethren who make significant contributions
- ▶ Create investment accounts for Lodge charitable projects for Brethren to donate to



MODULE II

Running the Lodge

Module Objective:

- As a result of your participation in this module, you will understand the operational, administrative, regulatory, and financial requirements of running your Lodge



Lesson 1

Lodge Operation and Management

Learning Objectives:

- Understand the responsibilities in managing the operation of the Lodge
- Understand the role of the Lodge's Past Masters and Trustees in advising the Master
- Understand the physical considerations for the Lodge property

Have You Ever Wondered?



- ▶ Do we own or rent this place?
- ▶ Do we have a mortgage?
- ▶ Who mows the lawn?
- ▶ Who cleans the Lodge?
- ▶ Who fixed the refrigerator last week?

The Worshipful Master is the Lodge's business manager



- ▶ Traits of an effective business manager
 - Effectively manages the office spaces
 - Effectively manages the calendar
 - Meets all schedules...on time
 - Maintains a budget...and is profitable
 - Puts together an effective team and helps them grow...
 - Takes care of his people...family/health are a priority !
 - Understands the impact of internal/external perceptions...and the law...

Question: Is the Worshipful Master required to do all that?
Answer: Yes, with lots of help (more on this later).



Where you can get help: Past Masters

▶ “Advisory Board” (Past Masters)

- Despite the “pew jokes”. . . they are invaluable assets to your lodge
- Use them as a sounding board . . . but make your own decisions
- Use them to resolve sensitive issues in the background
- Hint – use them as mentors for new members.
- Hint – set up a separate phone tree and/or email distribution and use it
- Keep them involved . . . keep them informed . . .
- Remember they have “invested” in your Lodge and most, if not all, want to see that investment continue to “pay off”.

Ownership of the Lodge property...



- ▶ Do you own your Lodge Building?
 - If you still have a mortgage...
 - Is there a Temple Corporation?
 - ...what are the terms? ...what is the payment? ...who holds the paperwork?
 - If you have paid off the mortgage, who has all the applicable paperwork?
 - If you are renting the building or meeting place . .
 - ...who signed the lease and what are the terms? ...what is the rental payment? ...who pays the rent?

- ▶ Do you have Lodge insurance?
 - Who has the copy of the policy?
 - What are the terms? What is the payment?
 - What does it cover? What does it not cover?
 - Is it in the name of the Lodge, or the Trustees?

- ▶ Does your Lodge have Trustees?



What is the role of the Lodge's trustees?

- ▶ “Board of Directors” (Trustees)
 - Important elected positions of trust and support
 - Meet with them, get to know them . . .
 - What do they do? . . . what monies do they control?
 - Hint – have them give a short presentation to the lodge

- ▶ Trustees typically are the registered title holders to the Lodge property
 - They also hold “in trust” any property or investments turned over to them by the Lodge
 - They have complete control over the investment methods of the monies in their trust; they must, however, turn the monies over to the Lodge when ordered to by the Worshipful Master

Operations and maintenance of the Lodge...



- ▶ What is the condition of the outside property?
 - Who maintains (mows, trims, paints) the property?
 - If not a brother, then who and at what cost?
 - Are there any major repairs, upgrades that need to be done?

- ▶ What is the condition of the building and equipment (kitchen appliances, air conditioning, water heaters, etc.)
 - Who maintains the building and at what cost?
 - Any major repairs, replacements, upgrades that need to be done?

- ▶ What utilities/services are in place (gas, water, sewage, trash pickup, etc.)

Simple Question: Who has keys to your Lodge?



Lesson 2

Lodge Administration

Learning Objectives:

- Understand the Lodge's administrative requirements
- Understand the role of the Secretary in managing the administration of the Lodge



Have You Ever Wondered?

- ▶ Where can I get a copy of the Lodge bylaws?
- ▶ Who picks up the mail?
- ▶ How did we get those new Presentation Manuals?
- ▶ Where did the Secretary get those pamphlets?
- ▶ What is a Methodical Digest ?
- ▶ Does the Lodge Secretary do anything by take minutes?

Your most important resource in the Lodge...



- ▶ The Lodge Secretary is your Administrative Officer, your “Subject Matter Expert”,...and your friend...you will be talking to him a lot !
- ▶ Get to know him...set up a routine with him before each meeting so you are both “on the same page” before you open the Lodge.
- ▶ Does he have an electronic account with the Grand Lodge? Has he attended the scheduled local sessions with the Grand Secretary?
- ▶ Where are the lodge records kept? Are they in good order?
 - Member records (Active, Demits, Deceased, Suspended,...)
 - Correspondence files
 - Lodge minutes
 - Audit reports

Get to know what the Secretary does



- ▶ Have a cup of coffee with the Lodge Secretary!
 - What reports does he file on a regular basis?
 - How does he account for annual dues?
 - What is a Monthly Activity Report? What happens if he does not file them?
 - What supplies are available through the Grand Lodge?
 - What supplies have to be gotten “outside the system”?
 - How does he prepare for the DDGM Annual Inspection?
 - What is the Annual Report and should you be concerned about it?

Work with the Secretary to prepare for your meetings!



- ▶ Meet with your Secretary before the Stated Communications to coordinate items of business
- ▶ Be aware of the active petitions and candidates
- ▶ Masonic Birthdays
 - It is a big deal...!
 - Get a list from the Secretary at the beginning of the year
 - How about 25 and 50 year veterans...should be a great presentation!! And you need to give the DDGM a “heads-up” on these awards so he can be there!

Remember: Your Lodge Secretary needs to know what you have planned for the meetings, too!



What reference materials should you have?

- ▶ What reference material do you have available in the Lodge?
 - Forms - Membership Petitions, Affiliation Petitions, Demits, etc.
 - Methodical Digest, Edicts, Executive Orders, Proclamations
 - Presentation Manual
 - Pamphlets/Brochures (Candidate, EA, FC, MM)
 - Alternative Method Booklets (EA, FC, MM)
 - Prince Hall Guidance
 - Current Book – List of Lodges
- ▶ Do you have a Lodge Library? How do you start? What do you start with?
- ▶ Get a copy of your Lodge's bylaws (more on this later...)

How do you communicate with members?



- ▶ How is the Trestleboard put together and mailed out? What does it cost both in dollars and in time? Do you need to make a change?
 - Consider sending out the Trestleboard electronically to save postage costs
 - Don't assume that sending out the Trestleboard at the beginning of the month will suffice in making Brethren aware of the month's activities – send out reminders!
- ▶ How do you “get the word out” to the brethren? Does it work?
 - Phone trees
 - Email distribution/listserv
 - Web page – it is up to date?
- ▶ How do you get thoughts and prayers out to Brethren?
 - What do you do when a brother or a member of his family gets sick?
 - How about good news celebrations?
 - You would be surprised what a small hand-written note will do!!!



Lesson 3

Lodge Laws, Rules & Regulations

Learning Objectives:

- Understand where to reference Virginia Masonic Law
- Understand the importance of each Lodge's bylaws
- Understand the significance of Grand Lodge proclamations, executive orders, and edicts

Laws, Rules, Regulations . . .



▶ Masonic Law

- Codified in the Methodical Digest
- “It’s only a lot of reading if you read it all...”
- Have your own personal copy and make sure it has all the annual updates...and mark it up to your heart’s content !!
- Your Lodge Secretary is your best friend...and your subject matter expert...
- Develop a matrix guide tailored to your lodge

▶ Lodge By-Laws

- Read them...understand them...adhere to them...
- Keep a copy in your files...
- This is the guidance of your Lodge!

▶ Executive Orders

- Issued every year...!
- Read them...understand them...adhere to them...
- Keep a copy or have a copy available in the Lodge for reference



About your Lodge's bylaws...

- ▶ You Lodge's bylaws will contain information about:
 - Your Lodge's meeting place and meeting date
 - Your Lodge's dues
 - Your Lodge's degree fees
 - Which officers receive compensation for their duties
 - Your Lodge's trustees
 - The procedure for amending the bylaws
- ▶ Changes to the bylaws must usually be communicated in advance to the membership and approved by a supermajority of the members present
 - Some one-time exceptions to the bylaws can be approved by limited dispensation by the DDGM (change of meeting date/place/time due to weather or other conflicts)

Study your Lodge's bylaws...they must be followed within your Lodge!

Laws, Rules, Regulations . . . (cont.)



▶ Edicts

- Read through them...understand them and how they apply or relate to Methodical Digest and in some cases...ritual.
- Example: Funeral Services (E-1-1994 W.H.M.)

▶ Proclamations

- Read them...understand them...adhere to them...
- You may need to plan some meetings around specific proclamations (e.g. Founders' Day)

▶ Additional Guidance (DDGM, Grand Secretary, etc.)

- You can get good information...and keep out of trouble...
- Your DDGM and your Lodge Secretary are your best friends...



Lesson 4

Lodge Finance

Learning Objectives:

- Understand the role of the Treasurer in managing your Lodge's finances
- Understand how your Lodge's money is managed
- Understand how the SVR tool works to determine appropriate dues



Who minds your Lodge's finances?

- ▶ The Lodge Treasurer is your “Chief Financial Officer” and your friend
- ▶ Are the Lodge finances in good shape?
- ▶ Have you read the last audit? Does anyone really read the audit before it is presented to the Lodge?
- ▶ How does money flow in and out of your Lodge?
- ▶ What happens if you have a requirement to pay for something “right now” and your next stated meeting is in three weeks?
- ▶ Do you have more income than expenses...or are your “on hand” cash assets slowly getting smaller and smaller?

Participate in an audit...you will learn a lot !!



Who minds your Lodge's finances? (cont.)

- ▶ Where are your checking and savings accounts...what bank and what branch?
- ▶ Are these “no cost” accounts?
- ▶ What if something happens to the Treasurer?
 - Who is on the signature cards ? Where are the signature cards?
 - Who can access the accounts in an emergency?
- ▶ Where are the various records kept? Can you access them in an emergency?
- ▶ Does the Lodge have Certificates of Deposit (CDs)?
 - What bank and where are the CDs physically located?
 - What are the terms? Is there a renewal date or automatically renewed?
 - What is the interest rate compared to current available rates?
 - Who has “signature authority” to manage them...or cash them.
- ▶ Does your Lodge have a safe deposit box? If so, where is it and who has access to it?

Do you need to adjust your Lodge dues?



- ▶ The Committee on Lodge Services has developed the *Lodge Viability Tool*,
 - The tool is designed to predict future trends in your Lodge's membership and dues revenue
- ▶ It will analyze the effects of 0, 2, 5, 10 and 15 members a year being raised on the entire membership
 - It takes into account how age demographics affect your lodge
- ▶ The tool will help you understand what your baseline dues amount should be, and whether you need to build in a COLA to account for inflation

Learn how to properly use the *Lodge Viability Tool*!!



MODULE III

Building Lodge Leadership

Module Objective:

- As a result of your participation in this module, you will be able to build a strong line of officers, set up effective committees, and use Grand Lodge and District resources to improve the quality of leadership in your Lodge



Lesson 1

Creating a Strong Line of Officers

Learning Objectives:

- Understand your responsibilities in nominating and selecting officers
- Understand the importance of evaluating and grooming the officer line and the members for possible advancement to an officer position

The importance of selecting your “leadership”...



- ▶ When Solomon built the Temple he employed thousands of apprentices and fellow crafts and relied on the master overseers to supervise them. Without this “team” effort the construction could not have been completed.
- ▶ Similarly in your lodge, you must utilize the talents of your members – leadership, organization, dedication to select the best candidates for officers and to serve on committees.
- ▶ You also should learn to utilize the talent available from your Grand Lodge and District Team to support your lodge.

One of your most important duties...



...before you even get elected and installed:

- ▶ You will need to select a Junior Deacon
- ▶ You will need to fill any empty offices in the elected line
- ▶ You will have to nominate those who will advance in line
- ▶ Often, your choices will be limited



How do I select my officers?

- ▶ Keep your eye out for those who you feel would be a good Worshipful Master
 - Who has shown an interest to get more involved?
- ▶ You should groom them to get in line when it is your turn to nominate them
- ▶ Evaluate the brethren in line behind you with respect to their leadership, management potential and commitment to the lodge
- ▶ In some cases, you sometimes need to decide not to advance someone already in line

Signs that an officer may not advance/succeed...



- ▶ Is not learning the ritual
- ▶ Is often absent from meetings and practices
- ▶ Does not show leadership potential
- ▶ Is causing division in the lodge
- ▶ Does not engage in any advance planning

What to do when advancement is not certain...



- ▶ Determine exactly what the problem is
- ▶ Decide if the officer simply needs more time to learn and prepare and perhaps should remain in his current office for another year
- ▶ You will need to explain to the Brother how he needs to improve
- ▶ If the officer does not improve and does not wish to step aside, you should consult with the Worshipful Master and Past Masters to try to gain a consensus on what to do
- ▶ Review your options and weigh the benefits of keeping him in line vs. removing him from line

Communication is the key to maintaining your line



- ▶ Hold monthly officer meetings
- ▶ Ask for input from all line officers on important lodge issues
- ▶ Work to develop consensus with the officers on both the Lodge's *5-Year Strategic Plan* and the *1-Year Tactical Plan*
- ▶ Mentor the officers and help them develop the skills they will need to succeed as Worshipful Master
- ▶ Have the officers chair a committee and take ownership for special projects

Don't overwhelm your officers...more than one event per week is probably too much!!



Lesson 2

Creating Effective Committees and Representatives

Learning Objectives:

- Understand the importance of committees to your lodge
- Understand the proper use of committees in planning and reporting on lodge programs and activities
- Create an effective committee structure

Effective committees...the key to an efficient Lodge



- ▶ Does the Worshipful Master need to do everything? No!!
 - He appoints committees to consider and recommend courses of action on critical issues for the Lodge
- ▶ By appointing committees, the Master focuses attention on programs of high priority of the Lodge and the Grand Lodge
- ▶ Committees give the Brethren avenues of involvement in the Lodge
- ▶ Involvement of line officers in the committees will provide visibility into critical issues for the Lodge and help prepare them to deal with these issues when they become Master

There are 4 core committees to be considered...



- ▶ Strategic Planning and Finance Committee
- ▶ Masonic Family Committee
- ▶ Membership Committee
- ▶ Lodge Operations Committee



Some additional committees to consider...

- ▶ Education & Leadership (if separate from Lodge Operations Committee)
- ▶ Scholarship (if one exists)
- ▶ Sunshine (sick and distressed - if separate from Masonic Family Committee)
- ▶ Building & Grounds (if separate from Lodge Operations Committee)
- ▶ Masonic Youth

Remember: It's better to have a smaller number of effective committees than a large number of ineffective ones

Thoughts on committees...



- ▶ Keep the committees reasonably small (3-5 members is a good number)
- ▶ Have the committees give regular reports on their activities during Stated Communications
- ▶ Are the same people chairing committees year after year after year...?

Lodge representatives...as important as committees



- ▶ Some tasks do not require a full committee, but are important enough to warrant a designated “representative” to serve as “action officer”
- ▶ These positions are no less important than your line officers or committee members

“Core” Lodge representative positions...



- ▶ Lodge Instructor of Work
- ▶ Lodge Education Officer
- ▶ Masonic Home Ambassador
- ▶ Lodge Blood Coordinator

Other Lodge representative positions...



- ▶ Catechism Instruction
- ▶ Funerals
- ▶ Librarian
- ▶ Webmaster
- ▶ Child ID
- ▶ Masonic Youth

And let's not forget other important questions...



▶ Catechism Work

- Who is teaching it in your lodge?
- What is the value of doing catechism vice “alternative method”?
- If between candidates, recommend training more coaches

▶ Who does the Degree lectures?

- Do you use your own Lodge brethren or do you have to go outside the Lodge?
- Do you need to start a training program?

▶ Masonic funerals

- Hint – a public ceremony that makes a lasting impression or a “major dent” in the impression of your Lodge
- Do you have to go outside the lodge every time for the Master's part?
- Do you need to start a training program?



Lesson 3

Grand Lodge and District Resources

Learning Objectives:

- Understand the resources available to Lodges from the Grand Lodge
- Understand the role of the District Team

Grand Lodge Resources:



1. *Reid Simmons Academy*
2. *Division Education Leadership Conferences*
3. *Grand Lodge Library and Museum*
4. *Masonic Relief Fund*
5. *Grand Lodge Scholarship Fund*
6. *Masonic Home of Virginia*
7. *Grand Lodge Web Site*
8. *Grand Secretary's Office*
9. *Masonic Herald*

And....



10. *Lodge Viability Tool*
11. *Committee on Masonic Education*
12. *Committee on Lodge Services*
13. *Committee on Public Relations*
14. *Committee on Membership*



What is the “District Team”?

- ▶ The District Deputy Grand Master (DDGM) is the personal representative of the Grand Master in each District
- ▶ Each DDGM has a “District Team” to assist him with executing his duties:
 - District Instructor of Work - nominated by the Grand Lecturer
 - District Education Officer - nominated by the Grand Provost
 - District Blood Coordinator - nominated by the DDGM
 - District Masonic Home Ambassador - nominated by the MAHOVA Ambassadors Committee
 - District Membership Coordinator - nominated by the DDGM
 - District Child ID Director - nominated by the DDGM

A few points about the District Team to keep in mind:



- ▶ All are appointed by the Grand Master at his sole discretion
- ▶ They are there to serve and provide resources for your Lodge
- ▶ The District Team should coordinate their visits with the Worshipful Master
 - Visit schedules should be confirmed by mid-December! Don't wait!



MODULE IV

Developing and Implementing Your Membership Goals

Module Objective:

- As a result of your participation in this module, you will understand the importance of member retention and methods to enhance a secure member base for your Lodge in the future



Lesson 1

The Importance of Member Retention

Learning Objectives:

- Understand the importance of member retention
- Understand the importance of reducing the number of members suspended for non-payment of dues (NPD)
- Understand methods of mentoring and retaining members in the Lodge

What does “retention” mean?



Retention: Function: *noun*: 1 a : the act of retaining : the state of being retained b : abnormal retaining of a fluid or secretion in a body cavity
2 a : power of retaining : RETENTIVENESS b : an ability to retain things in mind; *specifically* : a preservation of the aftereffects of experience and learning that makes recall or recognition possible
3 : something retained



The average Lodge in Virginia will have:

- ▶ Less than 10% of its members active
- ▶ Lose 1 member suspended for NPD for every 2-3 members lost through death
- ▶ No growth or a continual modest decline in membership
- ▶ Experience financial concerns from the loss of dues and degree fee income
- ▶ Rely on a smaller number of brethren to assume more responsibilities (officers, committee chairman, etc.)

Members say they become inactive for these reasons:



- ▶ “I don’t have the time”
- ▶ “It’s not what I expected”
- ▶ “No one contacted me after the degrees”
- ▶ “The Lodge was unfriendly”

Lodges can reduce the number of NPD's by:



- ▶ Maintaining regular communication with the member
- ▶ Educating the member about the benefits of Masonic membership
- ▶ Maintaining a mentoring program for all members and all ages
- ▶ Sharing human interest/positive stories with the membership, i.e., lodge helping a widow with her lawn maintenance, member admitted to the Masonic Home, etc.
- ▶ Presenting engaging programs and speakers at Lodge communications

Develop a plan for new members...



- ▶ Make certain that every member present talks with the new member at every meeting
- ▶ Ask the new member about his interests and expectations
- ▶ Invite the new member to participate in some Lodge activity
- ▶ Schedule family activities for the new member and his family
- ▶ Follow up with his coach and mentor. It is important to understand the needs and expectations of each new member. Make an effort to get to know the new Brother and understand what he is looking for in the Lodge.

Engage new members in the following ways:



- ▶ The Worshipful Master cannot do it all, but he can appoint a Member Relations Committee to determine if member needs and expectations are being met.
- ▶ Immediately after the first degree, interview the candidate in person and determine if he has questions
- ▶ Conduct a Member Satisfaction Survey with at least 12 recent Master Masons
- ▶ Create and maintain a database of the responses
- ▶ Analyze the results and develop a plan to address any issues

New members should be mentored in:



- ▶ Lodge protocol
- ▶ Masonic vocabulary (titles, phrases, etc.)
- ▶ Appropriate dress
- ▶ District and Grand Lodge activities (district ritual schools, Reid Simmons Academy, etc.)
- ▶ Masonic charities
- ▶ Importance of assisting Masonic Widows and brethren in distress



In addition, all new members should be:

- ▶ Assigned to a committee that interests them
- ▶ Encouraged to assist with degrees
- ▶ Communicated with on a regular basis
- ▶ Educated that Freemasonry feels his faith, family and career come first in importance
- ▶ Recruited to become a lodge officer, not coerced

Older members may need additional mentoring...



- ▶ Lodge communicating with brethren who have retired and moved out of state to check on their physical and financial health
- ▶ Visitations from members to those who are bed ridden due to health issues
- ▶ Finding a role for them to play in the lodge that is not as physically demanding, i.e., chair Widow's committee, make calls for phone tree, etc.
- ▶ For infrequent members, a "Rusty Nail" session might be beneficial



Member resources...

- ▶ Grand Lodge Committee On Membership
- ▶ District Membership Coordinator - Appointed by the Grand Master
- ▶ How to Guides: - Bring A Friend Program
- ▶ Informational Brochures, Pamphlets, Hand Outs: (Retention Tool Kit, Share The Light Booklet)
- ▶ *Other Grand Lodge Brochures/Pamphlets/Programs



Lesson 2

The LMIP Program

Learning Objectives:

- Understand what the Life Membership In Perpetuity (LMIP) program is
- Understand what impact the LMIP program can have on your budget and the number of members suspended for NPD



The lodge benefits from the LMIP program by:

- ▶ Providing a guaranteed dues income
- ▶ Reducing the number of members suspended for NPD's (even if contact is lost with a member or he becomes financially distressed his membership is "secured")
- ▶ A fixed amount of income that can be placed in the lodge budget
- ▶ A perpetual source of income even after the member is deceased, by paying for a LMIP the member is making an *investment* in his lodge



To become a LMIP, brethren must:

- ▶ Have paid the current dues for the year
- ▶ Pay the sum of 16 (sixteen) times the annual dues of the lodge plus all Grand Lodge fees and assessments at the time of the application
 - Brethren can pay in monthly installments if desired
- ▶ Maintain their good standing in any other lodge they are a member of



Once the LMIP is paid:

- ▶ The member is never assessed dues again in the lodge(s) where he is an LMIP
- ▶ The lodge will receive the amount of annual dues for the member
- ▶ The LMIP's are credited on the lodge Annual Return, if the amount of income from LMIP's exceeds the total payment due the lodge is sent a check from Grand Lodge



Lesson 3

Masonic Education

Learning Objectives:

- Understand the importance of Masonic education in the Lodge
- Understand the importance of selecting and empowering a strong Lodge Education Officer

Why is Masonic education important?



- ▶ It helps us become better men.
- ▶ It helps us better understand the Fraternity.
- ▶ It helps us to understand our obligations.
- ▶ It helps us to understand our origins and history.
- ▶ It enlightens the non-Mason about the Fraternity.
- ▶ It provides a solid foundation for understanding the ritual work.

Select a good Lodge Education Officer!



▶ He should:

- Understand the importance of the LEO position;
- Prepare for assignments by obtaining suitable reference materials or be able to access them;
- Attend the Division Leadership Conference, and participate in the counterpart session with the Grand Provost, DEO, and other members of the education team;
- Enroll and complete all of the Grand Lodge correspondence courses, if not already enrolled or completed;
- Prepare a Lodge Educational Program outline for the year. Include in it the educational requirements for the James Noah Hillman Award;
- Keep the DEO informed throughout the year of Lodge educational programs;
- Assist in attracting non-members to petition the Lodge;
- Keep Masonic education alive in the Lodge!

Priorities of the Lodge Education Officer...



- ▶ Each stated communication should include at least a short talk by the LEO
- ▶ Select a few more lengthy programs for 2-3 stateds throughout the year.
 - Open meetings to guests where possible
- ▶ Assist the Master in setting up external speakers for meetings, when asked
- ▶ Coordinate with the DEO in setting up the DEO's planned visit
- ▶ The LEO is urged to share his proposed annual or multi-year plan with the Master and Lodge Education Committee

Setting up a Lodge library...



- ▶ The LEO should help maintain and promote the Lodge's library
- ▶ The LEO or Lodge librarian should work with the Master to establish a budget to start/maintain the library
 - Also, ask members for book donations
- ▶ In addition to books, also consider including short talk bulletins, videos, and Masonic magazines
- ▶ Make sure your collection includes the Methodical Digest, and proceedings from the Grand Lodge's Annual Communication

Education sources for Brethren...



- ▶ Ask Lodge officers to give a short talk at a stated meeting on a Masonic education topic
- ▶ Masonic study groups work well with a core group or dedicated Brethren
 - Book club
 - “Master Craftsman” programs
- ▶ Read the Grand Lodge “Primers”
- ▶ Attend the annual Division Leadership Conference
- ▶ Attend the DEO education sessions (at monthly DIW Schools of Instruction)
- ▶ Attend the Reid J. Simmons Academy
- ▶ Complete the Leadership Correspondence Courses!



Lesson 4

Educating Non-Masons About the Fraternity

Learning Objectives:

- Understand the opportunities to educate non-members about Masonic membership
- Understand the importance of the Bring-A-Friend program and other resources from the Grand Lodge

First, consider the requirements for membership:



- ▶ Petitioner must be a male at least 18 years of age
- ▶ Be of good character
- ▶ Believe in a Supreme Being

Here are some great ideas for engaging non-Masons...



- ▶ Community Builder's Award
- ▶ Lodge Open House Program
- ▶ Eagle Scout Award Presentation
- ▶ Gold Award Presentation
- ▶ Scholarship Presentation
- ▶ Blood Drives
- ▶ Child ID Program
- ▶ Youth Programs
- ▶ Bring a Friend Night (more on next slide...)



The “Bring-A-Friend” Program

- ▶ Appoint a committee to run the event
- ▶ Develop a communication plan for prospective candidates
- ▶ Appropriate Masonic brochures and handouts
- ▶ Have Brethren on hand to answer questions
- ▶ Provision for refreshments
- ▶ Provide a tour of the Lodge building as part of the program

Refer to the GL “Membership Retention Toolkit” for more info

When a non-Mason asks questions about Masonry...



...answer them!

▶ Resources about Masonry:

- Grand Lodge website
- Informational pamphlet “*For Your Information*”
- Various books, including “*Freemasonry for Dummies*”
- You!



Questions?