

# SECTION 12

## LODGE RANGE PLANNING



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## **SECTION 12 – LONG RANGE PLANNING COMMITTEE**

*Welcome To The Future!*

*How to Develop a District and Lodge Long Range Plan*

### **12.1 WHY HAVE ONE?**

We have seen a continuing trend over the past four decades of decreasing membership and Lodge attendance. Death is a factor but lack of attendance can also be linked to resignations and suspensions that could come about from apathy, lack of knowledge or poorly run Lodges.

To get a handle on those problems we can control, it is important to have an overall Long Range or Strategic Plan. However, it is one thing to have a useful, well thought-out and worthwhile planning tool to help us revitalize our Fraternity and our Lodges; but if it is difficult to implement, or too overwhelming to even consider; then these noble initiatives will just gather dust in our collective libraries.

We all carry a membership card in this wonderful Fraternity and thereby have accepted a responsibility of making a contribution to it. The two concerns of decreasing membership and stagnant attendance have little to do with outside influences and therefore they are within our power to do something about them. Long Range Planning at both the district and lodge levels can do much to help.

#### **12.1.1 Vision and Mission Statements**

Let's get started! If you have seen the Grand Lodge Strategic Plan, you will notice that it has several integrated parts. The first, and most important part, contains the Vision and Mission Statements. Together they form the guideline or roadmap to maintain your focus for success. Additional parts include Key Result Areas, Strategies, Initiatives and Outcome Measurements.

*Vision Statement:* What do you, as a district or lodge, want to become? For Grand Lodge, that statement reads: *"To be the World's foremost Fraternal Organization by re-affirming the traditional Masonic values with Brethren acting on the Square."*

*Mission Statement:* The task to be performed. For Grand Lodge, that statement reads: *"Freemasonry in Ontario is a Fraternal Organization encouraging a way of Life, promoting Fellowship, Leadership, Universal Benevolence, and the practice of one's Faith for the Cause of Good".*

### 12.1.2 Key Result Areas (KRA)

Key Result Areas are the areas that your district or lodge has decided needs a focus according to your particular circumstances or situation. For Grand Lodge, these areas are: Fraternal Environment, Leadership Development and Communications. For a district, the Key Result areas that reflect district needs may be Membership, Leadership Development and District/Lodge Communication. For a lodge, these areas could be: Membership and Attendance, Business Portion Practices and Social and Community Involvement.

### 12.1.3 Strategies

Strategies - the 'What' of how you will achieve the Key Result Areas. Strategies are plans of action in order to attain specific goals - your Key Result Areas.

For Grand Lodge, the one strategy to attain their Fraternal Environment KRA is to create a climate of caring, enjoyable, involved visiting with brethren and families. For their KRA of Leadership Development, one strategy is to create a talent base with strong management and clear expectations. Their Communications KRA strategy is to create a value-added three-way flow of communication between Grand Lodge/District/Lodge.

For a district, the strategy for their KRA of Membership is to widen their horizons to attract people from other cultures. With regard to Leadership Development, a strategy is to standardize and document operating procedures. For District/Lodge Communication the strategy is to encourage and support Long Range Planning based on various lodges' identified needs.

For a lodge, the strategy for their KRA of Membership and Attendance could be to develop weekly 'Schools of Instruction' to improve ritual and floor work plus encourage sponsors and mentors to actively assist their candidates. For Business Portion Practices KRA, senior officers are to have a sound understanding of procedural rules with their Committee of General Purposes doing the groundwork for various issues. For Social and Community KRA, the strategy could be to form a weekly coffee club for members, wives friends, neighbours, cottagers and consider including the younger children.

### 12.1.4 Initiatives

Initiatives - the 'How' of achieving your various strategies. Initiatives are the several items listed under each of your strategies to eventually improve your key result areas. Initiatives can be as many and as varied as necessary to reach your stated goals. Use your imagination, try something different, take a bit of a risk; but make sure that they address the very real needs and concerns of your district or lodge.

In the interests of saving space, consult the Grand Lodge Strategic Plan for their list of initiatives. More importantly, the district and lodge initiatives are the selections of the respective district and lodge LRP Committees. They must address the very needs and concerns of your district or lodge according to the circumstances of your district or lodge.

Agreed upon initiatives require 'sparkplug' members of your district or lodge. These are the members who are active, idea guys, enthusiastic doers who will get your initiatives up and running. They should talk to their district executive or lodge officers, the chairmen of district committees or the lodge Committee of General Purposes about their concerns. Discuss the strategies and select one or two to begin and take action. The district or lodge then becomes the author of their own improvements and not be just a recipient of suggestions passed down from Grand Lodge.

### 12.1.5 Measurement Options

It is very important to have a method to appraise the results of your initiatives. These are the Measurement Options which record your progress such as successes or to flag a revisit to a particular initiative because it remains a worthwhile activity.

One colourful measurement format is the traffic light arrangement. Green for initiatives completed/successful; Yellow could stand for initiatives in progress or revisit; and Red for initiatives not yet begun. Another format is just to record, opposite each initiative, simple one word or short phrase comments, such as: yes, will consider it, doing this, ongoing, improving, unexpected spin-offs, well attended, start by October, donation, book facility, certificates well received, getting better, working on this, could be better, little activity - the list is endless.

### 12.1.6 Developing Your Own District or Lodge Long Range Plan

A S A P : Assess the Situation, Sensible Solutions, Action Plan and Prepare a Timeline

#### *'Assess' the Situation*

The District Executive and at the lodge level The Committee of General Purposes plus all officers to review: a) What is Working Well and b) What is Not Working Well and Why. Divide those at the meeting into two groups and have one group list, on flip-chart paper, the things that are going well throughout the district or within the lodge. The other group can list all the things that are not going well and why. After about 20 minutes, switch the pages and have the groups add to the list of suggestions. Collect all the sheets and display them on a wall, then focus on the concerns that are Not Working Well and Why.

Select only 2 or 3 focus or Key Result Areas (KRA) to work on in any given year. Keeping your list short makes it easier to keep in mind the essential problems and to avoid becoming discouraged or even overwhelmed with the amount of work to do.

### *'Sensible' Solutions*

Appoint a District/Lodge Long Range Planning Committee. First thing to do is to develop your Vision Statement (What do you, as a district or lodge, want to become) and a Mission Statement (The task to be performed). They are just reasonable, attainable statements of intent and not too grandiose that would have no realistic expectation of being successful.

Then, determine your district or lodge Key Result Areas. Itemize your strategies (What) to support each KRA and your initiatives (How) for each strategy. As you proceed, your Long Range Plan format will likely suggest itself; especially when it is one that is easy to work with and understand. You may wish to model your LRP format after that of the Grand Lodge Strategic Plan.

### *'Action' Plan*

Work on your initiatives and fine-tune them as necessary to attain each strategy and ultimately your Key Result Areas. Involve as many brethren as possible to give them a vested interest in the future of your district or lodge. A responsibility and feeling of accomplishment that fosters pride in having a hand in working toward something they believe in will make your district or lodge stronger, more interesting and relevant.

Don't forget to enlist the 'sparkplug' members of the district or lodge to get the plan moving. These brethren are the self-starters who can get things done. Remember the old adage: "If you fail to plan, you plan to fail!" If you believe in the necessity and benefit of Long Range Planning, then you might apply these 10 little words, only 20 letters: "If it is to be, it is up to me."

Execute your plan of action and don't forget to chart your progress. Then start on 2 or 3 more focus areas to address. Direct your attention more towards finding solutions than dwelling on problems. Here's a story for you:

When NASA began the USA space program, they quickly found that ordinary pens, to record scientific data, wouldn't work in zero gravity. To solve the problem, Anderson Consulting was hired to develop a pen that would work in extreme conditions. After 10 years and 12 million dollars, they did it by focusing on the problem. They created a pen that worked in zero gravity, upside down, under water, on practically any surface and in temperatures from below freezing to over 300 degrees centigrade. The Soviet space program focused on the solution - they used pencils!

### *'Prepare' a Timeline*

Set realistic timelines for each focus area and stick to them. Do not make them so short as to prove impractical and not too long as to become disheartening. Even if you only get one thing done, you're still ahead of where you were when you started.

### 12.1.7 An Example:

Leading Edge Lodge has selected Membership Improvement as a Key Result Area.

Vision Statement: Become the lodge with the largest quality membership in the district.

Mission Statement: Achieve and maintain a membership increase of 1% per year (a net increase of 2 members every year based on the current membership of 200; this is over and above the number of members lost through death, demits and suspensions).

Strategies include the following:

- Appoint a Long Range Planning Chairman.
- Form an enthusiastic Long Range Planning Committee.
- Identify what is necessary to attract members.
- Develop a demographic picture of the lodge; i.e. a 10 year age groupings, number of active vs. non-active members, look at different cultures represented, business backgrounds, etc.
- Create a brochure to interest potential petitioners regarding the value of Masonry in their community and what Masonry can offer them in their lives.
- Create a non-official position of Information Officer to inform the local weekly news paper about special events and announcements (be sure the event is newsworthy and has wide appeal). May have to clear any article or interview with Grand Lodge first. For instance: Grand Master visit for re-dedication of the lodge, local fund-raiser cheque for hospital building fund with picture. See the ABC Desk Reference at the end of this Section for many additional suggestions.

Initiatives to promote Membership could be:

- Carry pamphlets/cards about Masonry to give to interested men (see examples).
- Use the Friend-to-Friend Program - it works.
- Open House for family, friends, neighbours, cottagers (tour lodge, answer questions).
- Special tour of lodge for an interested man, his wife and family.
- Sponsor a youth sport team; e.g. soccer, inexpensive, fathers are of age group in which we're interested.
- Sponsor an academic award; donate a scouting trophy - community exposure.
- Form a coffee club, invite the ladies. Spin-offs could be quilting and gardening clubs.
- The Masonic Scoresheet:: There are 10 categories, with a maximum of 10 points each, a perfect score being 100. Try it, see how it works for your lodge. The categories can be changed to reflect district issues. Lots of LRP opportunities and ideas.

## **12.2 THE FIVE YEAR CONTINUING PLAN OF GRAND LODGE**

### **THE PATH FORWARD – FREEMASONRY IN ONTARIO**

#### **12.2.1 Its Mission**

The Mission of Freemasonry is to provide its members with opportunities for personal growth through fellowship, education, service and leadership experience, and increased self-esteem through challenge, recognition, support and the opportunity to give something back to the community.

Its Mission outside of the Fraternity is to fulfil charitable needs; display positive family values and offer leadership to the community.

#### **12.2.2 Its Vision**

Freemasonry exemplifies leadership, charity, fellowship and positive family values within the community, the country and the world at large.

#### **12.2.3 Its Objective**

The objective of Masonry is “to take good men and make them better” through the benefits of social intercourse and personal development that come from membership, including: a fraternal atmosphere; enhanced personal confidence; improved organizational and planning skills; enriched management competence; and strengthened public presentation and speaking proficiencies.

#### **12.2.4 The Commitment**

To be successful, the Five-year Continuing Plan must be accepted, adopted and implemented over a period well in excess of five years; this means a buy-in by successive Grand Masters. The Think Tanks held on February 7 and 8, 1997 and January 29 and 30, 1999, initially to discuss a plan for Masonry in this Grand Jurisdiction and secondly to review progress on the first two years of its implementation and propose changes for the ensuing five years, were attended by those members of the Board of General Purposes who have the very strong potential to provide the leaders of the Craft for much of the coming decade. With the firm support of a Five-year Continuing Plan provided by all those in attendance at each Symposium, there is a strong likelihood of commitment to such an undertaking for at least the next six years.

#### **12.2.5 Grand Lodge Committees**

For the Five-year Continuing Plan to be successful, the Grand Lodge Committees must be fully aware of what is being undertaken by the other committees and assist by providing the special expertise they possess. There must be contact among the

Committees; horizontal communication is required as an integral part of the plan and will be a contributing factor to its continued success.

### 12.2.6 Roles and Responsibilities

- **Grand Master:** provides the vision for the plan and acts as its ambassador.  
Deputy Grand Master: co-ordinator of all committees of the Board of General Purposes and, in conjunction with the Board, is responsible for the Masonic mission and future planning, including the execution of the Five-year Continuing Plan and a biennial Symposium to assess progress, identify revisions and incorporate his “personal touch” to the plan for the period during which he will serve as Grand Master.
- **Custodian of the Work:** provides guidance in identifying members at the “grassroots” level with special skills of use to Grand Lodge and its committees.
- **Committees of the Board of General Purposes:** in addition to the duties set out in the Book of Constitution or as established by the Board, they are responsible for verifying the plan, contributing individual committee expertise, providing strategic input and reviewing recommendation for modification to the plan. More specifically, they will have the following responsibilities:
  - **Long Range Planning:** creating, revising and monitoring the Five-year Continuing Plan.
  - **Audit and Finance:** assessing the financial requirement of the plan and locating the special funds needed to implement it.
  - **Public Awareness:** developing a unified communications plan to create enthusiasm and publicize the Fraternity, its vision and what it stands for to members and the general public, by optimizing current tools (the “Ontario Mason”, the DDGM Communiqué, Grand Lodge Web Page, etc.) and combining them with information technology, media coverage, exposure at community functions (Plowing Matches, community parades) and the production of videos.
  - **Masonic Education:** promoting, assessing and improving the correspondence courses, both the program for the general membership and the one for prospective DDGM’s, and developing further components for other leadership training requirements, including the Office of Worshipful Master, the District Secretary, aspirants for the Office of Grand Registrar and guidelines for Committees of Inquiry.
  - **Condition of Masonry:** identifying what is working/not working in lodges across the Grand Jurisdiction; recommending methods to make lodge meetings more meaningful and enjoyable; and, together with the Custodian of the Work, participating with the Deputy Grand Master in providing feedback on their



Reports and recommendations to the Immediate Past DDGM's shortly following the end of their term.

- **Lodge Resources:** promoting use of the Brother to Brother, Friend to Friend and Mentor, Officer Progression and Protocol & Etiquette Programmes as key components of the Five-year Continuing Plan and phasing in, as appropriate, the various components of the YES! (You're Extra Special) component; reviewing these Programs, assessing the success of each and proposing modifications.
- **Communications:** providing the communications link with the individual members through the promotion of meaningful Lodge Summonses, the DDGM Communiqué and special publications required to implement the plan.
- **Computer Resources:** promoting maximization of the use of information technology by Grand Lodge, the individual lodges and beyond, through the Grand Lodge Web Page.
- **Library, Museum and Archives:** promoting the advancement in membership knowledge through the use of Masonic books and videos, and appreciation of our heritage through display of Masonic heirlooms.
- **Seminars and Workshops:** developing seminar programs, selecting appropriate locations, providing necessary equipment and facilities, inviting target groups and promoting attendance.
- **Benevolence:** promoting the bestowing of benevolence to members and dependants in need by strengthening the focus on this key tenet of Masonry.
- **Lodge Buildings:** encouraging Masonic building management boards to properly maintain their structures and the surrounding grounds, so that Masonry's "face" to the local community creates a favourable impression.
- **Lodge Finances:** providing general financial counsel as required.
- **District Deputy Grand Masters:** actively promoting use of the plan and its components by the individual lodges.
- **Individual lodges:** as clients and potential benefactors of the plan, acceptance of the need for such a plan to stimulate members and to ensure the future health of the Craft; supplying the resources, opportunity and positive attitude necessary for the plan to succeed.

### 12.2.7 A Five Year Continuing Plan - Building Blocks for the Future

To be successful, this initiative must contain:

- strong, financially stable lodges
- an improved organization structure at all levels, with an effective delivery system
- improved communications among Grand Lodge, districts and lodges
- improved visibility between the Craft and the community
- a concord between Grand Lodge and the individual lodges that will create a feeling of partnership and ensure the future of Freemasonry
- leadership development at both the district and lodge level
- membership retention, revitalization and renewal

To ensure success, there must be:

- interface/continuous two-way dialogue and the input of various focus groups, e.g. neophyte Masons, lodge Officers, active Past Grand Lodge Officers, recently demitted former members, etc.
- empowerment to introduce the changes necessary and to make revisions to ensure continuous improvement
- a clear sense of direction, with reasonable, achievable goals
- continuity of the plan
- accountability for the plan and a means of measuring success
- giving members a reason to remain.

### **STRATEGIC PLAN      2007-2012**

- **FRATERNAL ENVIRONMENT**
- **LODGE RESOURCES**
- **COMMUNICATION & PUBLIC AWARENESS**
- **OPERATIONAL EFFECTIVENESS**



This is the sum total of the Five-year Continuing Plan, involving the various committees of Grand Lodge as set out above, the DDGM's and appropriate District committees, and the individual lodges. Its goal is to establish a firm network of strong, vibrant, financially stable, well managed lodges to which good men will be attracted and want to actively associate themselves.

### **12.2.8 Evaluation of Progress**

Results key to the success of the plan involve retention of members, increased attendance at lodge meetings and a growth in membership. To ensure that these goals are being achieved, the implementation of the plan must be monitored. This will be the responsibility of the Long Range Planning Committee.

The data to be collected would include membership statistics for the five years preceding the introduction of the plan, namely 1992-93 through 1996-97, and would include total membership, initiations, affiliations, restorations, deaths, demits and suspensions (all available through Returns to Grand Lodge, as printed in the Proceedings), lodge meeting attendance each month, divided between members and visitors. Similar data would be provided for each year of the plan, and compared with previous data to determine what shifts/changes are occurring.