

# SECTION 5

## OFFICER PROGRESSION PROGRAM



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## **SECTION 5 – OFFICER PROGRESSION PROGRAM**

### **5.1 THE OFFICE OF THE WORSHIPFUL MASTER**

#### **5.1.1 Introduction**

*Why this element so important?* ... It is meant to reach out to the brethren with the intention of providing a consistent message in accordance with the direction provided by The Grand Lodge of Ancient Free and Accepted Masons of Canada in the Province of Ontario, through numerous publications such as:

- The Book of Constitution
- The Masonic Manual
- Meeting the Challenge
- Book of the Work
- Towards the Square
- Mechanics of the Work

*Each is an essential tool for all Masons to work with in the lodge.*

*Who should be interested?* ... All Masons that are willing to learn, participate and implement the skills and knowledge of a Worshipful Masters duties and responsibilities.

*When should a Mason take interest?* ... Although designed with the Worshipful Master in mind, it should be directed towards lodge members well before they reach the Worshipful Masters Chair.

Ideally this element should become part of the training provided to the Deacons and Wardens to better prepare them for the duties and responsibilities of their office, prior to accepting their respective chairs.

#### **5.1.2 You Are Now Worshipful Master**

*Being elected and installed as Worshipful Master (WM) is “the highest honour the lodge can bestow upon any of its members.”*

It must be remembered that “the honour, reputation and usefulness of this lodge will materially depend upon the skills and ability with which you manage its affairs.”

As you progress through the chairs of your lodge, you are required to take on a bit more responsibility at each new position and extend your memory work a little further.

But the move from Senior Warden to Worshipful Master will produce the most dramatic change in those responsibilities.

Up to that point, you are taking orders and carrying out instructions. As Worshipful Master the entire burden of lodge management and its government has been placed squarely on your shoulders. YOU will give directions and instructions. YOU will be entirely in command of your lodge and responsible for the development of your officers. However, don't forget authority and responsibilities are equal partners in any endeavour. There are two essential things that you can do to better prepare yourself for that day when you sit in the Chair of K. S.:

- Develop an advisor committee of P.M. and call upon their advice.
- Be yourself and lead with a clear concise objective that others can follow.

The task of the WM is made up of two essential elements:

- Being adept at the degree work.
- Being a leader and managing the administration of the lodge activities.

The primary task of the WM is similar to a stone mason building a new structure. The better the preparation of the design the more functional the end result. If the WM prepares for the role as leader, the more rewarding is the task. Ask yourself "Am I preparing a sound foundation or is there chinks in the structure that need repairing?"

The task is made more difficult since Masonry is a purely voluntary organization and neither threats nor coercion will achieve any objective. The WM must accomplish his goals by setting an example, by his active direction, energy, planning and sincere enthusiasm. These are some of the tools you will need to do the job, but remember you have many skilled workmen in the quarry and be sure to call upon their skills. Past Masters should not be left to wilt and decay.

YOU will have one year to accomplish the things you would like to do to leave your mark on your lodge in particular and Masonry in general. PREPARATION is essential to fulfill your dreams.

### **5.1.3 Duties and Responsibilities**

#### ***Know the Constitution of Grand Lodge...***

When you were initiated you should have received a copy of the "Constitution" that is when you should have started to become familiar with the different parts. *Ensure that you have the most current edition.*

*You cannot be expected to know all PARTS but you should be able to find reference to concerns. You should pay particular attention to:*

- Sections that refer to the duties of the WM
- Sections dealing with lodge meetings
- Sections that refer to Grand Lodge

Consult you're the Book of Constitution and your Lodge By-Laws in all cases where you are not absolutely sure of yourself.

As written in the Book of Constitution, you are not make innovations are to the Ritual or Body of Masonry.

Local Traditions (LT) are not acceptable if they conflict with the approved ritual as established by Grand Lodge.

***Know your own Lodge By-Laws ...***

- Dates and times of meetings
- Dues structures (initiation fee, cost of apron, bible, etc are extras)
- Benevolence
- Committees refer to the by-laws to determine committee formation (they are as good as you allow them to be) use the skills of those members. Assess the purpose and usefulness of the committee duties.

***Applications – New Members ...***

These may be delegated to the Wardens, but it remains your responsibility.

- Ensure Degrees are carried out properly and with Dignity.
- Distribute the work, well ahead of the meeting date; Use Past Masters, Members (new and established) and Officers. Ensure that you have back-ups. (especially important for those long lectures).
- Deacons are responsible for escorting the candidate; try not to give them floor work.
- Ask members (the side benchers) to do work, this gives them a reason to be there.

*Just a suggestion ...* If the lodge is not full ask all members to sit near the front, this gives a better impression to the candidate, as he sees more members when he is at the Alter.

### ***Financial Stability ...***

As Worshipful Master you are responsible for maintaining or improving the financial state of your lodge. Your active participation is essential.

- Is there a Financial Budget and Long Term Financial Plan set up for the lodge? IF not why not! It may seem redundant when you know the expenses are the same, but have you considered a plan for future development, unplanned expenses and that emergency repair?
- Monitor dues collection. Do not wait to get involved until the member is 12 months in arrears.
- Get regular reports from the Treasurer and the Chair of the Finance Committee.
- Monitor the expenses against the budget.
- Make sure the J.W. is aware of your plans and knows exactly how much money is available for refreshments.
- Get involved with special projects; i.e. Masonic Foundation; Widows, etc.
- Know what belongs to your lodge
- Prepare an inventory and if necessary pass a copy to the Temple Corporation Chairman and any committee chairman who may benefit from it.

### ***Grand Lodge Resources ...***

Refer to the Grand Lodge Officers List which is provided after the annual communication of Grand Lodge in July. The list provides the names of the Grand

Lodge Officers for the year plus the names of all the Standing and Special Committee Chairman.

Get to know what each of these committees do and determine if they can be of assistance. Should you wish assistance contact your district committee chairman. If your lodge would like to learn more about any of the Grand Lodge committees contact the District Deputy Grand Master of your district to arrange for a presentation or perhaps a personal call with the Grand Lodge committee chairman.

You need to be aware if your lodge has a committee that shadows a district or Grand Lodge committee and are they working together.

Remember much of this information is also available on the Grand Lodge Website. [www.grandlodge.on.ca](http://www.grandlodge.on.ca)

### *Planning Your Year ...*

Plan and schedule all events well in advance. Don't leave things to the last minute.

*“Failure to plan means planning to fail”*

Involve your Wardens in the planning process and remember, as a leader it is essential to delegate the workload. Don't forget the ultimate authority and responsibility rests with the WM. Delegation does not transfer responsibility. Ensure that as the three principal officers of the lodge that you are proficient in:

- Practice calling-on and calling off.
- Practice opening and closing in each degree without having to refer to the book. Have it down pat.

Set up a schedule (the week after your installed) of what you will be doing each month for the whole year. It is easy to adjust the schedule as things change, the schedule gives all the officers and members an idea of what is happening so they can prepare accordingly. Share the schedule by posting it on a bulletin board if that is feasible.

Work closely with the Secretary. It is your responsibility to make sure that all reports, returns and remittances to Grand Lodge are submitted properly and correctly. Meet with the Secretary before each meeting to review the business to be brought forward.

Arrange to go over the administrative duties with the lodge secretary as soon after your installation as possible. Most lodge secretaries have been in the office for some time, so make use of their administrative knowledge.

Let the lodge secretary know what your plans are for the year and include him in committee work

Be sure to have the Worshipful Master's Message or Message From The East , ready for the secretary **on time**.

### Involve your Past Masters.

- Keep them involved and interested

- Use their experience, appoint a mentor(s) for you and your officers to call upon for advice
- Get to know them; they can be a great assistance
- Appoint them to do committee work
- Many lodges have “local traditions” and you will hear “when I was W.M. we use to do it this way” ..... *be alert to the fact that you are the Worshipful Master and you have taken an oath to follow the ritual as set out by the Constitution of Grand Lodge.*

Schedule Rehearsals. This is a very important aspect of leadership and preparation. Have them on regular days of the month and insert additional rehearsals when required. The satisfaction of your lodge members can be improved greatly if YOUR TEAM is well prepared.

- Make certain the candidate knows his work and is comfortable well before his passing or raising ceremonies are due.
- Issue work sheets well ahead of the meeting.
- Ensure all work, including the banquet festivities, is assigned and all participants have adequate time to prepare.
- Prepare a list of members that do each piece of work in the various degrees. Keep the list updated and encourage the brethren to learn new parts. *Do not fall into a rut of calling upon the same people for the same work over and over, get new members to learn new parts.*

Involve the Sponsors of the Candidate. Confirm they understand their role and what memory work is necessary. Make certain they are directly involved in the Candidate’s education by having them bring the Candidate to rehearsal and lodge meetings.

Have them familiarize the candidate with the ceremonies and workings of the lodge and ensure they understand how important it is to see that new candidates are well looked after and involved in lodge, district and Masonic activities.

Make them feel part of your lodge. Make them feel like family.

Visitation To Other Lodges. Make it an integral part of your year. It allows your lodge members to observe proceedings in other lodges to pick up positive points. Make a point of inviting your officers (especially SW & JW).

**Good planning will result in well attended meetings**  
**And create a positive atmosphere**

## 5.1.4 Anticipation & Preparation

### Know your Lodge Rental arrangements

- Regular and emergent meetings
- Special nights, practices, etc.
- Avoid holding functions on conflicting nights within the District

### Have Back-Up Plans

- Try to avoid exemplification of degree work under normal circumstances. Perhaps arrange for another candidate.
- Establish dates well in advance for special nights: education, Past Masters night, step up night and Official Visits.

### Prepare in advance for a Masonic Memorial Service

- Be prepared to come on very short notice
- Use your telephone committee
- Regalia and booklets must be brought to the service
- Acacia (cedar) sprigs are usually available at the funeral home but can also be supplied by a florist or a lodge member
- Appoint a lodge member to be director of memorial services for the year (it is a good idea to have an assistant)

### Prepare for the unexpected

There will always be unexpected events that occur.

- Illness of the candidate or of members doing work must be handled quickly
- A Board of Trial.
- Considering a Demit in Good Standing
- A Masonic Trial

If you anticipate what might occur when you arrive at lodge or during the evening, then you are inevitably better able to adjust to any particular situation. Likewise, if you

endeavour to prepare for every conceivable eventuality that you think might happen, then you will be better able to follow the proper course of action.

***Be prepared, Grand Lodge can help!***

### **5.1.5 Lodge Meetings**

***Start on time!***

Arrive at lodge at least 30 minutes before the meeting to ensure that the lodge room and banquet room are set up properly and if you have business with the secretary arrange to meet earlier. Above all, provide yourself with sufficient time to greet every member and visitor. *Shake their hand and call them by name.*

***Be prepared to establish a Board of Trial***

By greeting the visitors yourself, you can make them feel welcome and it will provide the opportunity to deal with this matter without undue delays in the work of the lodge.

***Keep the business portion of the meeting moving***

Remember each meeting should be divided into 3 parts:

- Business approx. 20 %
- Degree work approx 50 %
- Social approx 30%

The gavel is your instrument of authority. Use it wisely to eliminate unwanted conversations. Be knowledgeable of the correspondence and accounts before the meeting.

Establish an agenda, and follow it. If topics run too long defer them to another time or have the matter reviewed by the appropriate committee, if feasible.

Learn how to deal with motions and amendments, etc. you do not need to receive a motion to accept an application.

***Know Protocol***

Know how to deal with various situations. Be familiar with the Senior Officers of Grand Lodge as well as the Grand Lodge Officers in your District. Offer the Grand Wardens their respective chairs on greeting them in your lodge.

Also, try to attend at least one session of Grand Lodge Officers Progression, Protocol and Etiquette programs offered in your district.

### Appoint an Official Prompter

Only one Book of the Work or Ceremony of Installation should be open in lodge and it should always be the most current edition. Confirm the prompter is well versed in the proper wording and announce **before** the work of the evening starts who the official prompter will be for the evening. The brethren are to be instructed to look towards HIM if they need a prompt.

### Make use of idle periods: (Candidate examination, resuming comforts etc.)

Utilize this time to make district announcements (official visits, installations, special events etc) or conduct Masonic education. If you are planning on traveling somewhere, invite the brethren to join you.

Avoid “Freedom of the Lodge” this is a distraction and can be time consuming trying to get the brethren back into their seats.

### Be Proficient In Your Work

- Do Not Read any of the Ritual
- Speak Up! Speak clearly and slowly, making sure everyone in the room can hear you. Confirm with the S.W. that he can clearly hear and understand every word.
- Prepare cue cards showing the work assignments
- Use the IPM as your prompter and advisor, let him know you will be calling upon him for assistance (this gives him a chance to prepare as well).
- Ensure that your version of the penal clause is correct
- Be fully comfortable with the process of balloting. Review the Book of Constitution and the By-Laws of your lodge. Consider what action you will take if the ballot is unfavorable.
- Make sure the Deacons know how to collect the PG and PW, if need be.
- Remember the importance of demonstrating the G.R.S. used in the third degree. It is in the back of the ritual book.

**Close by 10 pm.!**

### 5.1.6 BANQUET HOUR

- Plan the banquet hour well in advance and give those proposing toasts time to prepare
- Formal banquets should be finished by 11 pm if a late dinner
- Formal banquet should be started in time to be finished by 7:30 pm so lodge can start on time
- Start your lodge on time so the social time will not be diminished, after all this is an important part of why we visit.

### 5.1.7 Summons

The summons is your responsibility, any errors will reflect on you. The Secretary may prepare much of the details of upcoming events but your message should reflect your own personality. Get it out on time.

Use your summons effectively. It is a personal note to each of your members, both attendees and non-attendees. Give the members something to think about and perhaps stir in them regret that a specific meeting was missed.

Think of ways to attract the attention of your members and hopefully motivate them in both their Masonic and personal lives.

Ensure a copy of each summons is mailed to your DDGM, to Grand Lodge and send a copy to each lodge in your district. A copy should also be sent to every Grand Lodge officer in your district, i.e. Members of the Board of General Purposes, and Grand Lodge Officers.

### 5.1.8 Personal Contact

Use the COMELY principle – **Call On Masons Of Every Lodge Yearly**

- Make contact with every member of your lodge
- If possible, write to your members on special occasions, anniversaries, birthdays?
- A phone call or card would be greatly appreciated by a new member (initiated or affiliated), a brother who is ill, a committee who has done a good job, a brother who has organized a special social/charity function.
- Letters and notes should be include Masonic Titles
- Envelopes should be addressed as Mr. \_\_\_\_\_ (no Masonic titles)

- Set up a phone committee to assist with spreading various news items and announcements.

### 5.1.9 Food for Thought

- *The delegation of duties and tasks must also include the delegation of authority.*
- Lodge committees work very well to establish, implement and monitor goals and to solve problems.
- Accepting advice from members is not a weakness.
- Understanding that the rights of Grand Lodge and your Lodge have to be protected, but negotiation and compromise with people is necessary and effective.
- Lodge Services is a “Membership Based” necessity. WE are providing a product and membership satisfaction is the utmost importance.
- Appreciate the need that members are given the opportunity to participate in governing the lodge within their community.
- Believe that as a modern manager, you have an obligation to train and develop members for their participation in succession plans.
- If a practice of philosophy is wrong, admit it and correct it quickly.
- Get feedback from your members and respond to their concerns
- Repeat and Clarify
- Be patient
- Be open to ideas and opinions but adhere to the Bk of Constitution and the Masonic ritual.
- Appreciate that what may be a small issue to you may be an important issue to the member.
- Loyalty and respect have to be earned.
- Accept the theory that most members do a good job, are loyal, dedicated and deserve your trust.

- You are one of many Worshipful Masters in your district, get out and visit as much as possible to support your fellow W.M. they in turn should reciprocate that visit.
- Invite the officers of your lodge to car pool with you when visiting, “the more the merrier”!

*As Worshipful Master, accept responsibility  
for the actions of members and appreciate that  
you are ultimately accountable for any mismanagement.*

As Worshipful Masters, enjoy your year and remember:

**ACCEPT YOUR RESPONSIBILITY, BE FIRM WHERE PRINCIPLES ARE  
CONCERNED & ENJOY YOUR YEAR BY HAVING FUN!**

#### **5.1.10 ESSENTIAL READING MATERIAL FOR THE WORSHIPFUL MASTER**

- Book of ritual – most recent version
- Book of Constitution of Grand Lodge- most recent version
- Lodge By-Laws
- Mechanics of Work – red book
- Meeting the Challenge
- Masonic Manual
- Previous DDGM annual report
- Memorial Service
- Book of Installation and Investitures
- Towards the Square
- Questions and Answers prepared by Custodian of the Work- 2004
- Questions and Answers supplement – 2006

## 5.2 LEADERSHIP

### 5.2.1 Introduction

Much has been written in the last 200 years about leadership and due to growing political and economic uncertainty; it has become a hot topic of late. The general view is that we need “LEADERS and LEADERSHIP at the TOP”.

We tend to look to “Grand Lodge” or the “Worshipful Master” for Leadership.

Leadership is not a stand-alone quality. It is an essential part of the overall effectiveness and efficiency of all stakeholders in every organization.

Many successful organizations now stress that all stakeholders have a leadership component along with the management of the every day routine work that must be accomplished (getting stuff done).

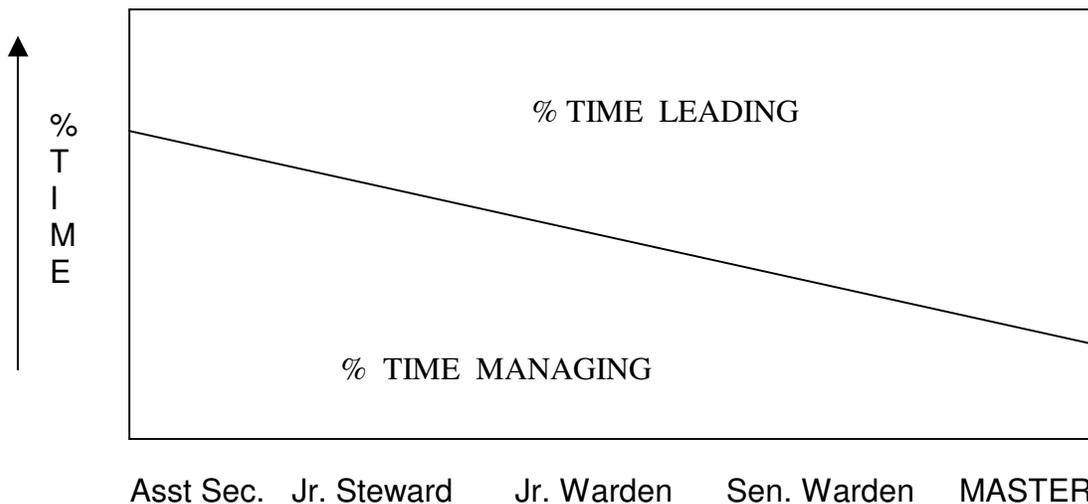
*What is the difference between Leadership & Managing?*

By the one ...

**LEADERSHIP** “DECIDING TO DO THE RIGHT THINGS”

By the other ...

**MANAGING** “DOING THE RIGHT THINGS, RIGHT”



Leadership is deciding to do the right things; a leader is a decision maker.

A good manager sees that those decisions are carried out or properly implemented. Newer Masons must feel that they have a responsibility to think like leaders, even if it is on a limited scope. They must spend the majority of their time managing or doing their assigned tasks to an acceptable level. As they progress through the chairs more leadership opportunities are available i.e. more decision making is available due to increased skill, experience, knowledge, expertise and authority.

Masters and Grand Lodge officers must spend a majority of their time dealing with Leadership issues while ensuring that the normal, routine, every day functions of their positions are also accomplished. Their high level decisions have a direct impact on the whole craft and the membership.

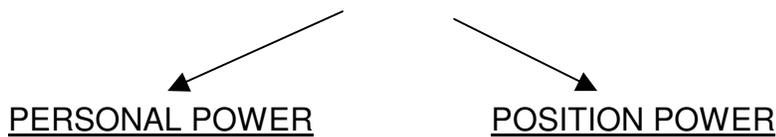
**5.2.2 Responsibility, Accountability, Authority**

A clear understanding of the PROCESS is dependent on a clear and uniform understanding of three words: Responsibility, Accountability, Authority.

**RESPONSIBILITY** --- A task, duty or obligation      something you do

**ACCOUNTABILITY** -- Being answerable      ARE

**AUTHORITY**      -- Power or Permission      you have or do not have



**5.2.3 Leadership Process**

**Grand Master**      Sets Strategic Plan and Vision      *150<sup>th</sup> Anniversary*



**District Deputy Grand Master**      Operational Plan for district      *Plan events*



**Worshipful Masters**      Individual Lodge Plans      *Event News in summons*

The Grand Master sets long-range strategic plans and a clear vision for the Craft in general.

The D.D.G.M. develops operations plans for his own district based on the strategic plan.

The Worshipful Masters set goals and individual plans for his Lodge.

Following this process keeps all stake holders informed and on track with their efforts. A common and clear understanding of where we are going, what we are doing and why we are doing it is critical to the long-term success of the organization.

**5.2.4 Qualities of Effective and Efficient Leadership**

Effective ----- gets things DONE!!

Efficient ----- less cost - money, morale & motivation

Successful leaders must have or acquire many skills: Listening, speaking, delegating, training, goal setting, motivating, self-confidence,

Chairing and participating in meetings, leading and serving on committees.

A recent study of successful leaders, by Queens University, showed that the pivotal factors were **the behaviours and attitudes demonstrated by leaders**.

The critical areas were: openness and honesty, accessibility, setting and clearly communicating the forward direction, linkage between tasks and the big picture, demonstrating and expecting high performance levels, tangibly showing respect towards others at all levels, responding to and addressing others concerns, expressing appreciation and providing credible recognition for work well done by individuals at all levels.

Delegation

There are several reasons for delegation, for training purposes, to even work load, to relieve your work load, due to skill or expertise. There is a difference between delegation and dumping. If it is dumping, be honest and explain the circumstances. Good two-way communication, giving the right information and asking the right questions is critical to success. Clearly explain what authority the person has or does not have, define success in terms of results, not necessarily the methods, ask if they need any additional resources or assistance and if they can accomplish the task.

There should be a clear understanding of the importance and impact of failure or success. Individuals and groups must always receive credit for their efforts and or success.

Meetings

The deliverable of the meeting must be clearly stated in the meeting notice. Proper planning and preparation are vital to the success of every meeting.

A written agenda with time allotment to each item must be provided.

The control of time, topic and input without stifling input is a skill that must be mastered. The careful assignment of responsibilities with follows up or due dates and the accurate recording of the minutes all contribute to success.

Good decisions can be made with the information and input of all participants. Accurate and timely minutes are critical.

Goal Setting

Goals have certain characteristics: S.M.A.R.T.

- S** -- Specific clearly defined
- M.** -- Measurable the before and after measures of success
- A.** -- Attainable the person or group can deliver
- R** -- Realistic the circumstances will not prevent success
- T** -- Time bounded a clear deadline

The setting of goals is similar to negotiating a contract. All parties have input, all options are explored, and the resources necessary for success are available and agreed on.

Motivation

The respect you develop as a person, a manager and as a leader will have a profound impact on your ability to motivate others. This respect is developed over time and is a result of your interpersonal skills and how you communicate with and treat others. Recognition for excellent work, constructive one on one feed back while respecting the dignity of the individual, and your own high standards of performance and behaviour will earn the respect of others.

As we are a voluntary organization, the ability to motivate others with out position authority is a necessary quality. You cannot motive people who do not want to be motivated. You can create a climate where those who wish to, can be motivated.

Communication

Written and oral communications skills are important to leaders and managers.

**1<sup>st</sup> STEP**

What do I want to accomplish? (Why are you going to communicate?)

**2<sup>nd</sup> STEP**

PLAN           What, When, Where, To whom, By whom, How.

The Masters message in the summons requires particular thought, as it is an important information source to the members. The current and future lodge activities and challenges are important topics.

The use of PERSONAL POWER as opposed to POSITION POWER when deciding HOW to communicate is as important as deciding WHAT to communicate.

**5.2.5 Self Development**

Personal growth and development are one of the benefits of our great Fraternity. That growth does not happen without work and effort by yourself and others. Self development is a vital part of that growth. We have talked about and used examples from many Masonic publications. Each of you are encouraged to make a personal commitment to your own development by reading one book each year.

A list of Masonic publications is available from Grand Lodge. You may also utilize the Grand Lodge Library where many resources are available in either book form or audio and video tapes. In addition, many great books are available from your local library such as Steven Covey’s “Seven Habits of Successful People” or Alex McKenzie’s “The Time Trap” is excellent reads.

And finally, we encouraged you to explore the opportunities presented by the College of Freemasonry. The Master Mason’s course is divided into four programs; Masonry at Work, History and Origin of Masonry, Administration and Organization and Preparing for Leadership. There is a nominal fee for each and after successful completion of each program, a certificate will be awarded. Upon completion of all four programs, a certificate for "THE COLLEGE OF FREEMASONRY" will be presented.

Encourage younger officers and members, by your example, to do the same.  
**Leadership and self development is not restricted to lodge officers.**