

The Masters Path Workshop

The Business of Freemasonry *Planning for Your Year in the East*

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One of the most rewarding years in one's Masonic career is the year a Brother serves his lodge as its Worshipful Master. If not properly planned, though, it can be one of the most traumatic. When a year is properly and effectively planned, a Master will enjoy each and every meeting and event, and at the end of his term will wonder where the time went. This section of the manual will go over WHY it is important that you plan and HAVE a plan for your year, and how to go about making a plan.

As Master of your lodge, you are tasked with the overall MANAGEMENT of your lodge. This involves many aspects, from programming to ritualistic and from new members to our elderly Brethren and widows. It is not reasonable to expect an incoming Master will have *all* the requisite skills to be able to effectively manage *and* lead his lodge.

The Masters Path is designed to give you some basic skills to enable you to effectively plan and lead your lodge through the upcoming term. Additional reference material can be obtained from Allen E. Roberts' books "*The Search For Leadership*," "*Key to Freemasonry's Growth*" and Carl Claudy's book "*The Master's Book*." There are many others available too, but these are some of the best.

Planning is essential for any organization to succeed. Not just any planning, because sometimes planning can be flawed, but *proper* planning, based on clearly defined goals and

objectives with valid data. In order for this to happen, one must possess at least the basic knowledge of his organization. The outcome of one Master's proper planning can be read in "*Success of Proper Planning*" from the Trowel Magazine and located on page 65 of this manual.

A constructive Master will have a detailed plan and will be able to motivate himself and his lodge. He will communicate his goals and objectives through his officers and his lodge notice. He will seek the advice of those wiser and more experienced than he. He will recognize the natural talents and abilities of his past masters and membership to think and reason, and use those people to his best advantage.

He will make HIS goals THEIR goals, and will take pride in their accomplishments, which, will essentially be his goals. He will give those successful full credit for their successes, even though it was his plan that succeeded. He can take pride in knowing he was able to get his plan in motion and motivate others to ensure its proper completion. A successful Master will not let his ego get in the way of a successful program.

Essential Planning

When you first became a Mason, you sat on the sidelines until you became an officer. During those formative years, you always waited for the Master to say or do something. In most cases it was seamless – the Master

was prepared. But now you will soon be sitting in the East of your lodge and all eyes will be on YOU! Nothing will happen in your lodge until you, as Master, make it happen!

Be prepared for all contingencies during your tenure. Have a plan and an agenda for every meeting, and stick to it. Speak with your secretary and treasurer before the meeting and know what their reports will contain. This way, you'll be avoiding any potential conflict and will not have any surprises.

Your agenda should block out your meeting and enable you to keep on schedule. When someone offers a controversial issue or statement and you are not in agreement with it at the time, be prepared to say "*no*" and offer your reasons for it. It may be as simple as needing further study or you may feel it would be too divisive for your lodge. In any event, you are the Master of your lodge and have the power to make such decisions. You'll hear more about the powers of the Master later, and you can read more about this subject in Claudy's book.

You should plan your meetings to be fun and interesting. A boring meeting that only reads the secretary's minutes, pays the bills, and recites a paragraph or two of ritual will not hold a Brother's interest for too long. Spice up your meetings with topics of Masonic interest. There are many events and obligations that compete for our time. Coming to lodge is our "spare" or "discretionary" time. You have to make it *quality* time. You have to give your membership a good reason for coming back the following month or they won't be back.

When you write your Master's Message for your lodge notice, make it an extension of yourself. Plan what you are going to say. It is how you will

"pay the craft their wages" by thanking those who helped make the previous month's meeting successful and welcome those who have recently joined or affiliated with your lodge. It is how you will promote your upcoming programs and activities. It is how you will communicate with those members living too far or otherwise unable to attend lodge. Give your members their money's worth! They want to read about their lodge.

Planning Process

Planning for your term as Master is a fairly straightforward one. The best way to do this is to set up a large board or by using 12 sheets of paper. Think of everything and anything you may try to accomplish during your year and write them down on stick-on notes or file cards. Prioritize your thoughts and arrange them in a logical order. Once you assign them to various months, you'll get to see the total picture. Compare your schedule with the schedule of Masonic activities posted on the Grand Lodge's web page to avoid potential conflicts.

Meetings

A successful lodge meeting will have a four-course meal consisting of good ritual, good programming, good food or collation and a dessert of good camaraderie. Once you cook up this recipe, your members will want to keep coming back.

Planning for a degree night meeting requires rehearsals. Rehearsals of the ritual and floorwork are essential to present the best image possible to your candidates. All line officers should attend your monthly rehearsals to ensure all standards are met. Take

your ritual seriously. Theme nights encourage more brethren to attend, especially if they mean something to them. If your ritual is weak, don't hesitate to request a dispensation to call in a degree team. Their performances are generally excellent and your candidate will get so much more out of it, especially if your officers are unsure of themselves. Remember, your candidate expects your best effort in order to get the most out of the degrees.

There are still many programs available for non-degree nights too. A "rusty brothers' night" conducted by your ritualist, who reviews the obligations, grips, words, and other areas of importance. A lodge history night conducted by some of your oldest members or past masters talking about what the lodge was like during the earlier years. Table Lodges are always a big hit, as are other forms of festive boards. Be ready with an alternative plan in case your candidate is unable to attend a degree. The bottom line is don't let your members lose interest!

Criteria for Effective Planning

When you set up your plans for the year, meet with your officers and other dedicated members of your lodge. Decide where you want your lodge to be in one year, five, and even ten years out. Will you be able to remain as a viable Lodge? Will you be able to afford to remain in your current facility? Set your goals accordingly and form your strategy to achieve those goals. Who will be responsible? As Master you can delegate authority and some responsibilities, but YOU are ultimately the one held accountable and responsible for all actions of your lodge.

Vision/Mission

Your vision is what you hope to achieve. Examples of catchy visions are "*Quality is Job One*" from Ford Motor Company, "*It's the Real Thing*" from Coca-Cola, and "*We Love to Fly and it Shows*" from Delta Air Lines. In setting up your vision plan for your lodge, you and your committee will think in broad terms. This is not the time for specifics. In this situation there's no such thing as a bad idea. Eventually, it will be time to start condensing and narrowing your thoughts down to a manageable few, then to a final vision. Your consensus will be reached when no one disagrees that the final vision fits the image each individual has for your lodge.

Once you have your vision, it is time to set the mission – how you're going to achieve your vision. You will go through the same procedures as before, but this time *money* enters the picture. Will you be able to afford your vision? If your vision is for your lodge to be the BEST lodge in your area, then you'll need to formulate your mission to include an introduction of expansion of programs, promotion of public awareness programs, and publicity directed to how your lodge serves your community. What are you going to need to distinguish your lodge from all others in obtaining your vision or reputation?

Once you have your vision and mission completed and implemented, you'll need to periodically review it for relevance and modifications due to unforeseen changes in conditions. You'll also check off those areas where goals have been completed.

Essentially what you're doing by involving your membership and past masters is setting the craft to work by giving them necessary instructions.

Lodge Improvement Plan

Once you have your immediate plan in place you can possibly focus on a broader, more far reaching Lodge Improvement Plan that uses many of the points set up in your vision and mission, but applied on a longer term basis. This will focus on leadership of the lodge and continuity from year to year. This plan will be the most difficult yet important functions you can perform. Without a plan, your lodge may suffer from hesitation, changing of direction too often, and just plain chaos from either the absence of a plan or an ineffective leader. It could ultimately lead to the deterioration of your lodge that, depending on its severity, may not be recovered from.

As an incoming Master, you should have a fairly good assessment of where your personal strengths and weaknesses are as well as your lodge's. Set your goals to bolster the weaknesses but ensuring the strengths remain so. Assess the "pulse" or attitudes of your lodge by the membership. A periodic survey sent to the membership can gauge if they feel they are getting their money's worth of their membership. You can also use this venue to determine any untapped resources for new members and gauge the level of interest in community service programs to promote your lodge.

It may seem strange, but many Masons are elected master of their lodge and have no idea of what is expected of them. This, despite the presence of an Officer's Training Manual available from Grand Lodge! You and your senior officers are expected on the suites of your District Deputy Grand Master as he travels throughout your district. You and all

your officers are expected to attend your rehearsals, the Masonic Lodges of Instruction in your district, and participate in the district's annual Exemplification and country fair activities. These should be the minimum levels of performance and requires planning to ensure these minimums are met.

Your Lodge Improvement Plan should include an improvement in the ritual and the presentation of it. This topic and the reason were covered earlier, but mentioned here because you, as the Master, have to plan for this to happen. Extra rehearsals or sedality nights for the officers may be necessary. Again, this is where a monthly calendar comes in handy. You get to see the total picture and can make better use of your collective time together. Your plan may include the consolidation of meeting nights to make your meetings more efficient for all involved.

Goals and Objectives

When you set your lodge's goals, make sure they are "measurable." These can range from an improved attendance at meetings, Improving the financial condition of your lodge, the establishing of social events, or reducing the number of demits and suspensions. These are very measurable from year to year. Examine the level of resources of your lodge necessary to achieve your goals, and how the success or failure of these goals will affect your plan and your lodge. Prioritize your goals placing the ones with the greatest impact first in case your resources become unbalanced and skewed towards other areas. How many goals can be accomplished on the remaining resources available? You may need an

actual vote of your lodge or finance committee to place your plan in effect if it involves a substantial expenditure of money.

Motivation

One of the best methods of motivating your lodge is to show your membership that YOU are enthusiastic and self-motivated and really want to succeed in your year as Master. Develop the ability to communicate in an understandable language. Ask "*Do I make myself clear?*" Have a positive attitude, and above all, *S M I L E !* When your membership sees you invigorated, enthusiastic, and doing something to improve your lodge, they will assist you. They too will want to share in the good times. Don't be afraid to ask for help either. Many people are willing and able to assist but prefer to sit idly by waiting to be asked. They figure that if they are not asked, they are not needed. Use them to your best advantage. Ask them!

What may seem like a small insignificant item can make a big difference in the finished product. Pay attention to those details. Give your members the tools necessary to complete the tasks at hand, and show them how those tools can and should be used.

Communications

Communications with your senior officers is essential for any lodge to succeed. They should all know the current status of your plan, and be able to continue it should anything happen to you. Publish periodic reports in your lodge notice for all to see. Tell them what your goals and objectives are and who is chairing certain events. Quarterly reports allow for an effective

way of evaluating your plan and making any adjustments if necessary. As you term nears its close, make a final evaluation of your year. What went right? What didn't achieve your expectations and why? What should your lodge change for the succeeding year? Communicating effectively avoids confusion, avoids surprises, avoids disappointment, avoids budget deficits, and more importantly it avoids the lack of future volunteers.

Again, when you are nearing the completion of your year, pay the craft their wages! Thank them in open lodge and in your lodge notice. Have a member appreciation night to recognize those who have taken on various responsibilities and recognizing their accomplishments. By doing this you will ensure an adequate supply of assistance for your successor's plan, and you will soon be able to sit in your lodge as a Past Master, ready to say to a new master down the road "*we've never done that before!*"

Lodge Budget Program

A few brief words on setting a lodge budget! Grand Lodge has developed an excellent spreadsheet to help masters and lodges set up realistic budgets based on income and projected expenses. It is flexible and it *does* work. Meet with your wardens, treasurer and secretary to determine actual costs from previous years to better forecast expenses and incomes for your year. With this information you can better budget your resources and identify areas that need additional income if you project a deficit.

Dues collection is one of the most important functions your secretary does. Your lodge collects two forms of dues: its own operating dues and the dues specified as due the

Grand Lodge. Your lodge is only a conduit for the Grand Lodge portion of the dues you collect, and they are payable to the Grand Treasurer's office *upon request* in three installments by statements sent to the lodge secretary.

Lastly, your treasurer is required to file annual financial statements with Grand Lodge to demonstrate your lodge complies with the IRS and DOR charitable requirements. If your lodge has charitable funds set up, you must spend a portion of those funds every year. Check with the Grand Treasurer's office for the exact details.

DEVELOPING THE 12-MONTH CALENDAR

There are many considerations important to the development of a Lodge calendar. While some appear obvious, they are often overlooked. Start with dates over which you may have little control.

Your Regular Stated Communications are the easiest entries to make. They are scheduled for a certain day of a certain week of the month according to your By-laws and usually at a certain time. Make sure to make note of special requirements such as Annual Meetings and Election of Officers. At this time you should also note legal and religious holidays in case they affect your scheduling of events or other meetings.

The next entries should be the Quarterly Communications of Grand Lodge on the second Wednesdays of March, June, September and December. At this time you should also note the dates of the Feast of St. John the Evangelist and the Grand Master's Country Fair. If you are not sure of

these dates, your District Deputy Grand Master can be of help.

The meeting dates for the Masonic Lodge of Instruction should now be entered. Again, this is a designated day of a week of a month that can be fully scheduled in advance in the majority of cases. There are some Masonic Lodges of Instruction that do not have a designated day of a week of a month primarily because it meets in a different location each month. These dates are also important for planning when you will confer degrees on your candidates.

Exemplification and the Lodge of Qualification dates will probably not be known at this time but a note should be made to check for these during the year, filling them in as soon as they are known.

Dates of the Official Visits and Fraternal Visits in your District may or may not be known depending on where you fall in the presiding District Deputy Grand Master's term of office. However, Official Visits are usually scheduled during the months of September through November, while Fraternal Visits are usually scheduled during the months of February through April. A general note on your planning board should be made until you can pencil in the firm dates.

Officers' meetings, along with committee meetings and reports are for your benefit and assistance in guiding these areas to meet your goals and criteria. These meetings should be meaningful and accomplish a express purpose. Meetings of this type that accomplish nothing other than to get together will prove detrimental to future support and attendance.

The spacing of social functions by your Lodge and with other local Lodges can be as important as what event is planned. Don't tightly

schedule too much together and leave long gaps in other areas of your plan. Also, consider the type and cost of the functions you are planning and the strain you may be placing on the pocketbooks of some of your older members who may be on fixed or limited incomes. The use of family themes for some of these functions will help to increase spousal support and camaraderie. Plan Lodge events for religious periods. Don't be afraid to try something new and different. Innovation creates interest. Interest creates attendance and support.

Brief Bullet Points. . .

Unavoidable scheduling events

- Regular Communications of your Lodge
- Indicate all legal and religious holidays; pay particular attention to those religious holidays that are importance to your membership (*e.g.*, Christian, Jewish and Moslem holidays; Greek Orthodox Easter). If your Regular Communication, falls on - or on the eve of - these dates, you will likely want to solicit dispensation to reschedule your meeting with dispensation needed from the Grand Master.
- Grand Lodge
 - Quarterly Communications of the Grand Lodge
 - Feast of St. John the Evangelist
 - The Grand Master's Country Fair
- District events
 - Masonic Lodge of Instruction
 - Officer installations

- Fraternal and Official Visits of the District Deputy Grand Master
- District Officer meetings of the District Deputy Grand Master
- Regular Communications other Lodges in the District
- Exemplification
- Lodge of Qualification

Lodge-related events with date flexibility

- Lodge officer meetings
- Committee meetings
- Membership development events
 - Tentative special degree dates
- Schedule special Lodge fraternal, social and family events

Forward to the District Deputy Grand Master

- Your term plan and budget two months BEFORE your installation
- Membership development plan

Level of suggested planning detail

- Installation:
 - Date Scheduled
 - Installation officer arranged
 - Installation invitations distributed to officers for their guests for mailing 30 days ahead
 - Photographer arranged
 - Flowers ordered

- “Return of Officers” sent to Grand Secretary day after installation

THE 1-31 FOLLOW-UP FILE SYSTEM

The most successful management tool you can implement is a follow-up file. You need 2 sets of heavy manila folders numbered 1-31 and one set of 12 heavy folders labeled January through December. Each set of 1-31 folders should be set-up with the current month in the forefront followed by next month with the second set of 1-31 folders behind that.

Of course, 1-31 represents the days of the month. To utilize this system, when you have an action item due in March next year, put it in the February folder so that you may look at it in February and assign a priority and a follow-up or completion date to comply with a required March action. When this month is over, simply replace the month folder, pick up that folder along with the 1-31 files and rotate them behind the next month. Each day, open the folder that corresponds to the date and look at what you have placed in there for an action item.