



GRAND LODGE OF CANADA

A.F. & A.M. IN THE PROVINCE OF ONTARIO

LONG RANGE PLANNING TOOL KIT

FOR LODGES

This material has been prepared by a sub-committee of the Long Range planning Committee of the Grand Lodge of Canada in the Province of Ontario. The sub-committee goal is to provide tools to aid in the identification of areas of importance and to develop plans for improvement in those areas. This particular document is aimed at individual Lodges. Future work may be of more value to Masonic Districts.

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Introduction:

A plan is a mechanism for getting from where you are to where you want to be. There is usually more than one way to get from point A to point B and some ways are better than others. A plan allows you to choose the path with the fewest dead ends and pitfalls. It also gets everyone in agreement on the path to be taken so you don't find yourselves working at cross purposes when you are half way home. And, with a plan, you can build in mechanisms for checking your progress. It's nice to know that you are still headed towards your goal; it is essential to know if you are not still headed there.

There are several elements needed for the establishment of a good plan. One is having some sort of high level goal or vision. There is an old proverb that says "If you don't know where you are going, any path will do." In an organization with multiple members and any sort of democratic value, it is important to have a high level of alignment around these goals. Business is more efficient and life a lot easier if everyone is headed for the same end point.

A second essential element is some knowledge of your starting point. Another old proverb says "If you don't know where you are, a map doesn't help." You must know the current state of anything your plan hopes to change whether that be profits, membership, customer satisfaction or a geographic location. Change is the logical outcome of a plan but for change to have value, you must know what you are changing from.

A third element is focus. Knowledge of your starting point may point out lots of areas of potential improvement but they can't all be tackled at once. Some may represent immediate and serious threat; others may have great pay-off in the longer term. Agreement on priorities is essential to successful execution of a plan

The plan must include a starting point and a general approach for next steps. Having agreed on the area of greatest opportunity or concern, there is still the question of what to do. It is here that you draw on the resources of the organization and community and on the experience of your membership. There must be agreement on the detail of first steps; these are the things you will do tomorrow. There must be general agreement on how to tackle things coming over the horizon. This is your five year view.

And finally, there is need for a monitoring process. A plan must be monitored both from a process and a progress point of view. The process point of view ensures that you are taking the action that was agreed on. The progress point of view is to ensure that you continue to move towards the anticipated goal. Things will be learned in the course of executing the plan. Basic assumptions may be flawed; circumstances change; things don't work as advertised. The monitoring process allows you to recognize this and modify your plan to compensate.

Five Steps to a Plan

Before beginning this process, the master of the lodge should appoint a person and, perhaps, a small committee to provide leadership in its early stages. Because of the need for alignment, this person must be good at directing discussion and building consensus. The team may change later in the process as different skills will be required.

Step #1 Start to build a vision.

Hold a Lodge of Discussion around the question “How would you like your lodge to look in five Years?” Open the discussion to membership, culture, finance, physical plant, social programs and anything else members wish to discuss. Create an opportunity for members to hear the range of views held by their brothers. Learn the areas of widespread agreement and potential disagreement. Each will provide opportunities for change and improvement.

Step # 2 Establish a baseline.

Use the Masonic Scoresheet as a mechanism to assess the current state of the lodge and its management. The Scoresheet serves to introduce a set of management “topics” on which to focus later discussion. It also forces the members to share their views on the strengths and weaknesses of the lodge.

Step #3 Set some priorities.

Review the overall list of management topics on the Scoresheet and characteristics of the lodge each is likely to effect. Use a multi-voting system to establish the lodge’s view of relative importance. Agree on the top two or three to address first.

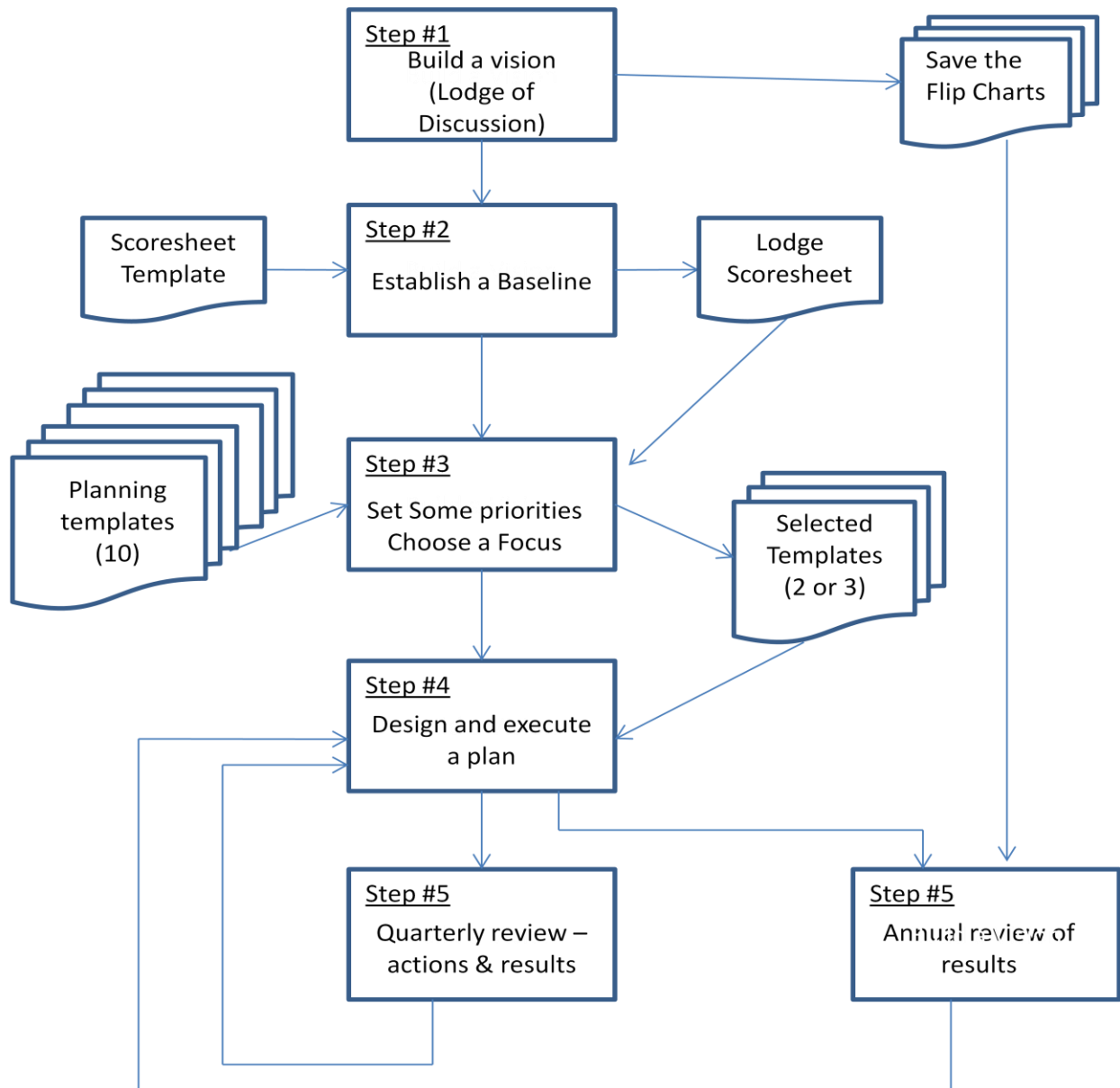
Step #4 Choose a plan of action.

The planning committee may have to change to develop plan details. Use the planning templates to help with identification of supporting tools and processes and the establishment of performance targets. A time line should be set for completion of actions and the achievement of goals. The plan should be brought back to the full lodge for approval. Execution of the plan may be left with the planning committee or the Committee of General Purposes but it is important that individuals be named to specific actions and charged with reporting their completion.

Step #5 Schedule reviews.

Either the planning committee or the Committee of General Purposes should be called on periodically to report on activities related to the plan. Are we doing what we said we would do? The planning committee should report annually on progress toward the agreed performance targets. Is the plan really making a difference? This is an opportunity to “tweak” the plan – add some things, take some things out, shift the emphasis. At least every five years, the whole process should be repeated.

A Long Range Planning Process for Masonic Lodges



Step #1 - Build a Vision

Pose the questions:

How would you like your lodge to look in five years?

Break the formality of the lodge. Call from labour to refreshment and either go to a separate location such as your banquet room or put chairs in a circle on the floor of the lodge.

Look at the “Lodge of Discussion” model (Appendix C) and use what seems best for your particular lodge. Appoint a facilitator – someone who can maintain control while encouraging open discussion.

Have a discussion which is as open and free-flowing as possible. If you are not sure where to start, try using the subject headings of the Masonic Scoresheet as a stimulus.

Appoint a scribe and equip him with a flip chart pad, masking tape and felt pens. He should capture thoughts and ideas as they are presented and post them where they can be seen by everyone. People build on the thoughts of others.

The facilitator can set some rules (and solicit them from the assembly) such as:

- Encourage free thought but on the topic
- Consider all aspects of the lodge and its management.
- No idea is a bad idea unless everyone agrees that it is
- There is no place for personal attacks

The scribe should try to capture ideas as presented without censorship or editorializing

A time limit should be set on the discussion and it should conclude with another question:

Do you think we'll get there on our current course or should we be building some plans?

The Worshipful Master should assess the level of consensus around this issue and announce the plan for making a plan.

Save the flip charts.

Step #2 - Establish a base line

Have the lodge secretary or some other officer research the hard data portions of the Masonic Scoresheet (Appendix A) – membership, attendance etc. – before addressing it in lodge.

Complete the Scoresheet in a full lodge format such as that used for Step#1.

Arrange for presentation of the results as they are tabulated either using a computer and projector or manually on a flip chart. Electronic versions of the Scoresheet are available as both word documents and Excel spreadsheets.

Without suppressing creativity, try to avoid jumping into corrective action on individual topics. However, there should be room for discussion of whether or not a particular score is “OK” for this lodge. The objective is to learn where you are, not to get a score of ten on every topic.

Step#3 - Set Priorities

Look at the elements of the Masonic Scoresheet. The table on the next page may help you consider why they are important.

Develop consensus on the priority of Scoresheet elements.

- Display the Scoresheet elements using a blackboard, flip chart or a computer projector.
- Have individual lodge members score the elements using either the multi-voting model or investment model outlined below.
- Have the facilitator display the individual scores and calculate a group result.
- Select the top two or three for immediate treatment. Scan the next three because they will be on the horizon in a year or two. Leave the last four as “nice to have”.
- Note that the ranking scores are a very coarse measure. Don’t go to the wall over a ten percent difference.

The multi-voting model

In multi-voting, each person in the group sets his own first second and third priority. The facilitator or chairman then records the number of first, second and third choices beside each element of the list. He then gives three points to a first choice, two points to a second choice and one point to a third and totals the points for each topic. The topics are then ranked in order of their point score. The one with the greatest number of points is the group’s first choice; second highest is second choice and so on.

The investment model

When using the investment model, each person imagines that they have \$100 to invest in the total program and they can allocate dollars to different topics as they see fit. Some people may put all their money into a single topic they feel is very important. Others may spread their investment across a range of topics. After these individual decisions have been made, the facilitator or chairmen totals the investment for each topic to determine priority.

Helping to Focus (from Scoresheet elements)

Focus on:	If you want to:
Candidates	<ul style="list-style-type: none"> ● Have stable or growing lodge membership
Members Attendance	<ul style="list-style-type: none"> ● Have “healthy” attendance ● Enough attendance to make meetings useful and enjoyable
Social Activities	<ul style="list-style-type: none"> ● Have an enjoyable Masonic life outside the lodge as well as within
Business Operations	<ul style="list-style-type: none"> ● Have enough financial security to : <ul style="list-style-type: none"> ○ Have a secure meeting place ○ Meet charitable goals desired by the members
Lodge Work	<ul style="list-style-type: none"> ● Build a culture of excellence within the lodge ● Put high visibility on the symbols of Masonic values
Esprit de Corp	<ul style="list-style-type: none"> ● Have relaxing and enjoyable meetings ● Build sustainable friendships
Use of Grand Lodge Programs	<ul style="list-style-type: none"> ● Maximize the use of available resources and support ● Maintain consistency with other parts of the jurisdiction
Attendance at District Events	<ul style="list-style-type: none"> ● Build Masonic relationships outside your own lodge ● Be part of the larger Masonic community
Banquet Hour Organization	<ul style="list-style-type: none"> ● Improve the social hour by giving it some structure ● Build a level of comfort with formal social behaviour
Past Masters in Line Officers’ Chairs	<ul style="list-style-type: none"> ● Maximize the use of the Lodge’s human resources ● Encourage the growth of younger members

Step#4 - Choose a plan

For each of the top priority Scoresheet elements chosen in Step#3, choose a planning template from those provided in Appendix B. These templates are intended to aid in selecting performance measures and identifying useful aids. The left side of each template is lifted directly from the corresponding element on the Masonic Scoresheet. The right side of the template contains two sections – “Questions” and “Mechanisms/Initiatives”. The “Questions” section attempts to bring a little more focus to the deliberations. They are certainly not the only questions one might ask but they will suggest an approach. The “Mechanism/Initiatives” section tries to identify some of the resources or companion programs which might be of value.

There is a Grand Lodge tool or committee to address almost every need a lodge is likely to have. It would be foolish not to draw on the knowledge and experience these represent. However, every lodge is unique. Each has its own set of problems and priorities. Each must live within its own community. And each can bring to bear a unique set of skills. Grand Lodge programs should aid, not restrict.

For a plan to be meaningful, it must result in an increase in value or a change in behaviour. The plan is not simply a list of things to be done. It is also a list of results to be achieved. It is important that these be specified as part of the plan and that a time line be associated with them. What do you expect and when?

Step#5 - Schedule Reviews

The plan might be managed through a Committee of General Purposes or a special Planning Committee. Either way, a Planning Chairman should be appointed to report progress to the lodge.

At least quarterly, the Planning Chairman should give a brief report to the lodge. The report should address action plans and be in the form of:

“Here’s what we said we would do.” and

“Here’s what we did.”

Results (performance measure, behaviour change etc.) may not be visible immediately but should be reported if they are. Signs of progress are always encouraging.

At the twelve month point in the plan, a report should focus on results

“Here’s the result we hope to achieve.” and

“Here’s what we have so far.”

It might be of value at this point to walk through the flip charts from Step#1 and pose the question “Is this still what you want your lodge to look like?”

Conclusion

No single plan will serve the needs of every Lodge. The best plan for a particular Lodge will be based on unique starting conditions and a vision agreed to by that Lodge’s members. The process described in this document should assist in articulation of the starting point, achieving alignment on the vision and

mapping these to a plan of action. If the plan is to succeed, it is important that it have the full backing of the Lodge membership. Debate can (perhaps, should) be heated while the plan is being developed. The Brethren should state and defend their positions with respect to planning issues. However, an attack on a position should never equate to an attack on the person and when the debate has ended, everyone should fall in and give the plan his full support. After all, it is all being done for the betterment of your Lodge.

Appendix A

"THE MASONIC SCORESHEET"

LODGE: _____ **NO:** _____ **LOCATION:** _____

<u>CANDIDATES:</u>	<u>Points</u>	<u>Score</u>
New Application for Initiation in the past Twelve Months	2 each	_____
New application for Affiliation in the past Twelve Months	1 each	_____
Using "Friend to Friend" to attract new candidates	1 each	_____
New Application for Initiation currently before the Lodge	1 each	_____
10 Points Maximum		Total: _____

<u>MEMBERS ATTENDANCE:</u>	<u>Points</u>	<u>Score</u>
Attendance up in past Twelve Months	3	_____
Attendance same level in past Twelve Months	2	_____
Non-Past Masters in attendance at regular meetings	2	_____
Non-Past Masters in attendance at emergent meetings	2	_____
Quorum at all meetings (regular, G.P. and emergent)	1	_____
Past Masters only attendees	-1	_____
10 Points Maximum		Total: _____
Membership as of July 1 of current year..... Average number at meetings.....		

<u>SOCIAL ACTIVITIES:</u>	<u>Points</u>	<u>Score</u>
Ladies' Nights	1	_____
Lodge Golf Tournament	1	_____
Official Lodge visitation with Lodge in your District	1 each time	_____
Official Lodge visitation with Lodge in another District	1 each time	_____
Lodge open house	1	_____
Other: Christmas, Picnic, Pancake breakfast etc.	1 each event	_____
If you have more than three social events for outsiders, family and community at large each year	3	_____
10 Points Maximum		Total: _____

<u>BUSINESS OPERATIONS:</u>	<u>Points</u>	<u>Score</u>
Yearly budget	2	_____
If dues are sufficient to cover expenses	1	_____
Lodge produces financial balance sheet	1	_____
Lodge produces income statement	1	_____
No dues arrears over 2 years	1	_____
No dues arrears over 1 year	2	_____
Invoicing to membership	1	_____
Finance committee meeting regularly	1	_____
Financial 3 or 5 year plan	1	_____
Lodge planning 3 or 5 year plan	1	_____
Professional advice with investments	1	_____
Dues in arrears 3 or more years	-2	_____
10 Points Maximum		Total: _____

"THE MASONIC SCORESHEET"

Page Two

LODGE WORK:		
	<u>Points</u>	<u>Score</u>
Regular Ritual Practice - W.M., S.W., J.W. Only	2	_____
Regular Ritual Practice - all officers and participating members	4	_____
Opening & Closing - no prompts - last meeting	1	_____
Local Ritual committee to make recommendations	1	_____
Ritual Education re: floor work for deacons	1	_____
Lodge members attended District/G.L. Lodge of Instruction	1	_____
Recent (last 2 years) changes to ritual used promptly	1	_____
Deacon fail to attend District or Grand Lodge Instruction	-2	_____
10 Points Maximum		Total: _____

ESPRIT DE CORPS:		
<u>WHICH STATEMENT BEST DESCRIBES YOUR LODGE?</u>		
	<u>Points</u>	<u>Score</u>
Total peaceful harmony of all members	10	_____
Harmony is worked on successfully	8	_____
Differences quickly resolved	6	_____
Differences resolved after longer period (3 months)	3	_____
Constant argument & tension, especially in open Lodge	-5	_____
PICK ONE ONLY		Total: _____

GRAND LODGE PROGRAMS:		
<u>USE:</u>		
	<u>Points</u>	<u>Score</u>
Membership (Sponsor/Mentor) Program with all new (?)s	2	_____
Masonic Education presented regularly	2	_____
Brother to Brother program used regularly	2	_____
Masonic Foundation supported by inserting info in summons	2	_____
Friend to Friend program	2	_____
Made use of Grand Lodge Benevolence	1	_____
W.M. Includes part of G.M.'s message at meetings	1	_____
Sought advice from any Grand Lodge committee	1	_____
10 Points maximum		Total: _____

ATTENDANCE AT DISTRICT EVENTS:		
<u>LODGE REPRESENTED AT ANY OF THESE EVENTS</u>		
	<u>Points</u>	<u>Score</u>
District Meeting	1 each	_____
District Divine Service	1	_____
District Seminars (Long Range Planning, Education, Ritual)	1 each	_____
District Grand Master Reception	1	_____
DDGM Reception (official visit at District Lodge)	1 each	_____
Community Charity Event	1 each	_____
Grand Lodge Toronto in July	1	_____
Other.....	1	_____
10 Points maximum		Total _____

"THE MASONIC SCORESHEET"

Page Three

<u>BANQUET HOUR ORGANIZATION:</u>		
	<u>Points</u>	<u>Score</u>
Food at every meeting	4	_____
Formal Head Table at every meeting	2	_____
Toast at every meeting - Queen & Craft	1	_____
Grand Lodge	1	_____
Visitors	1	_____
Candidate	1	_____
Junior Warden	1	_____
Guest Speaker	1	_____
Formal dinner for DDGM's official visit	1	_____
	10 Points maximum	
		Total: _____

<u>PAST MASTERS IN LINE OFFICERS' CHAIRS:</u>		
	<u>Points</u>	<u>Score</u>
No Past Master in W.M. Chair	1	_____
No Past Master in S.W. Chair	1	_____
No Past Master in J.W. Chair	1	_____
No Past Master in S.D. Chair	1	_____
No Past Master in J.D. Chair	1	_____
No Past Master in I.G. Chair	1	_____
No Past Master in S.S. Chair	1	_____
No Past Master in J.S. Chair	1	_____
No Past Master in Chaplain's Chair	1	_____
Master Masons waiting to occupy chairs	3	_____
	10 Points maximum	
		Total: _____

<u>HONEST ANSWERS GIVE HONEST EVALUATION!</u>		
<u>TAKE A MINUTE AND LOOK UP THESE STATS FOR YOUR LODGE!</u>		
1 Membership last year		_____
2 Membership five years ago		_____
3 Number of new candidates (including affiliates) last year		_____
4 Number of new candidates (including affiliates) in last five years		_____
5 Number of suspensions last year		_____
6 Number of suspensions in last five years		_____
7 Number of deaths last year		_____
8 Number of deaths in last five years		_____
9 Of the new members in the last five years, how many:		
Attend regularly?		_____
Attend sometimes?		_____
Never attend?		_____
Are officers of the lodge?		_____
Resigned?		_____

Appendix B (1)

<u>CANDIDATES:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>How many applications per year would you <u>like</u> to have?</p> <p>How many degrees could the lodge hold?</p> <p>How much “work in progress” could you tolerate?</p> <p>How many affiliations would you like to have?</p> <p>How many new people could you make welcome?</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • Friend to friend nights to bring in potential candidates • “Public” events to make the general community aware of Freemasonry • Fraternal visits to make the Masonic community aware of your lodge
<i>New Application for Initiation in the past Twelve Months</i>	<i>2 each</i>		
<i>New application for Affiliation in the past Twelve Months</i>	<i>1 each</i>		
<i>Using "Friend to Friend" to attract new candidates</i>	<i>1 each</i>		
<i>New Application for Initiation currently before the Lodge</i>	<i>1 each</i>		
<i>10 point max</i>	<i>Total</i>		What would you <u>like</u> the score to be?

Appendix B (2)

<u>MEMBERS' ATTENDANCE:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
Attendance up in past Twelve Months	3		<p><u>Questions:</u></p> <p>How many of your members are <u>able</u> to attend i.e. not ill, infirm or moved away?</p> <p>What fraction of <u>able</u> members would you like to have in attendance?</p> <p>Is membership rising or falling? Has attendance followed membership?</p> <p>If non-past masters are not attending, do you know <u>why</u>?</p> <p>What percentage of Past Masters is attending?</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • Brother to Brother nights - bring the missing out of hiding • Rusty Mason nights - overcome the embarrassment of not having attended in a while • Establish a telephone committee - reach out to the missing • Establish a transportation committee - help the disabled • Conduct a customer satisfaction survey (anonymous or personal) to determine <u>why</u> members are not coming out
Attendance same level in past Twelve Months	2		
Non-Past Masters in attendance at regular meetings	2		
Non-Past Masters in attendance at emergent meetings	2		
Quorum at all meetings (regular, G.P. and emergent)	1		
Past Masters only attendees	-1		
10 point max	Total		

Appendix B (3)

<u>SOCIAL ACTIVITIES:</u>			
<i>Lodge Management Element</i>	<i>Points</i>	<i>Your Score</i>	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>How many ladies <u>could</u> attend? What's missing from your Masonic life? Is Freemasonry part of your social life or a burden imposed on it? Is Lodge fun? How is that reflected outside the Lodge room?</p> <p><u>Mechanisms/Initiatives:</u></p> <p>Publish a calendar of special events. Plan Lodge(s) of discussion to address:</p> <ol style="list-style-type: none"> 1. Socializing with ladies 2. Interlodge visitation 3. Planning Social Events with other Lodges <p>Attend the DDGM's Official visits to other lodges. As a lodge, participate in community events such as festivals and parades. Look for opportunities to share activities with other organizations e.g. service clubs.</p> <p>Contact the Grand Lodge committees on Public Awareness, Youth Initiatives or the MasoniChIP program to help find a focus.</p>
<i>Ladies' Nights</i>	<i>1</i>		
<i>Lodge Golf Tournament</i>	<i>1</i>		
<i>Official Lodge visitation with Lodge in your District</i>	<i>1 each time</i>		
<i>Official Lodge visitation with Lodge in another District</i>	<i>1 each time</i>		
<i>Lodge open house</i>	<i>1</i>		
<i>Other: Christmas, Picnic, Pancake breakfast etc.</i>	<i>1 each event</i>		
<i>If you have more than three social events for outsiders, family and community at large each year</i>	<i>3</i>		
<i>10 point max</i>	<i>Total</i>		

Appendix B (4)

<u>BUSINESS OPERATIONS:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>Do you know your financial situation? Do dues cover expenses? Are your investments increasing in value or decreasing? Why? Is your Lodge meeting place under threat? What result do you want? Are you meeting your charitable goals?</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • Find someone in the Lodge who has accounting or business management experience. Get help preparing a balance sheet and an income statement. • Look at trends in membership and expense for the last three to five years. Project as a basis for budgeting. • Contact the Grand Lodge Advisory Committee on Lodge Finances. • Set up one of the Lodge book-keeping packages (Excel or Quicken) available from Grand Lodge. • Set up a special committee to deal with arrears.
Yearly budget	2		
If dues are sufficient to cover expenses	1		
Lodge financial balance sheet	1		
Lodge income statement	1		
No dues arrears over 2 years	1		
No dues arrears over 1 year	2		
Invoicing to membership	1		
Finance committee meeting regularly	1		
Financial 3 or 5 year plan	1		
Lodge planning 3 or 5 year plan	1		
Professional advice with investments	1		
Dues in arrears 3 or more years	-2		
10 point max	Total		

Appendix B (5)

<u>LODGE WORK:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>Do you know how your work compares with other Lodges?</p> <p>Do you have a standard your Lodge hopes to meet?</p> <p>Do the members of your Lodge care about ritual?</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • Hold Lodges of Discussion to address the importance of excellence in ritual. • Visit other lodges, especially ones with a reputation for good ritual. • Invite special degree teams to hold or exemplify degrees. • Invite well known and respected Masons to observe and critique your work. • Contact the Protocol and Etiquette Committee of your District or Grand Lodge for guidance.
Regular Ritual Practice - W.M., S.W., J.W. Only	2		
Regular Ritual Practice - all officers and participating members	4		
Open & Close - no prompts - last meeting	1		
Local Ritual committee recommendations	1		
Ritual Education re: floor work for deacons	1		
Lodge members at District/G.L. Lodge of Instruction	1		
Changes to ritual (last 2 years)used promptly	1		
Deacon fail to attend District or Grand Lodge Instruction	-2		
10 point max	Total		

Appendix B (6)

<u>ESPRIT DE CORP:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>Is harmony getting in the way of meaningful discussion? When discussion gets heated, does it stay on topic or does it get personal? Can Brethren “agree to disagree” on some issues and move forward on others?</p> <p><u>Mechanisms/Initiatives:</u></p> <p>If only two or three individuals are in disharmony, the WM might appoint an arbitrator to discuss the issue with them outside the Lodge. If disharmony is more wide-spread, the WM might raise the issue in the social hour following Lodge. It is important to deal with the situation quickly and to condemn the behavior, not the individuals. For a chronic situation, the community or business network might be poled for a person skilled in group dynamics to facilitate a team building exercise.</p>
Total peaceful harmony of all members	10		
Harmony is worked on successfully	8		
Differences quickly resolved	6		
Differences resolved after longer period (3 months)	3		
Constant argument & tension, especially in open Lodge	-5		
10 point max	Total		What would you <u>like</u> the score to be?

Appendix B (7)

<u>USE OF GRAND LODGE PROGRAMS:</u>			
<i>Lodge Management Element</i>	<i>Points</i>	<i>Your Score</i>	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>Are there recognized problems the Lodge is not dealing with? Do people feel they are not contributing to their potential? Are people comfortable in their advancing roles (as Masons? as Lodge officers?)</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • Cornerstone Program • Use Planning tool to set priorities • Lodge Resource Manual •
<i>Sponsor/Mentor Program with all new (?)s</i>	2		
<i>Masonic Education presented regularly</i>	2		
<i>Brother to Brother program used regularly</i>	2		
<i>Masonic Foundation supported by summons info</i>	2		
<i>Friend to Friend program</i>	2		
<i>Made use of Grand Lodge Benevolence</i>	1		
<i>W.M. Includes part of G.M.'s message at meetings</i>	1		
<i>Advice Sought from Grand Lodge committees</i>	1		
<i>10 point max</i>	<i>Total</i>		

Appendix B (8)

<u>ATTENDANCE AT DISTRICT EVENTS:</u>			
<i>Lodge Management Element</i>	<i>Points</i>	<i>Your Score</i>	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>Do your members have Masonic friends outside their own Lodge? Is Freemasonry a life style or just a monthly meeting? Do people travelling to Masonic events invite others to join them?</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • District Trestle Board • Include District and Grand Lodge events in the Lodge Tracing Board • Establish a travel committee to coordinate ride sharing • Invite District teams to your Lodge for degree work • Review District events at every meeting; get a report from people who attend
<i>District Meeting</i>	<i>1 each</i>		
<i>District Divine Service</i>	<i>1</i>		
<i>District Seminars (Long Range Planning, Education, Ritual)</i>	<i>1 each</i>		
<i>District Grand Master Reception</i>	<i>1</i>		
<i>DDGM Reception (official visit at District Lodge)</i>	<i>1 each</i>		
<i>Community Charity Event</i>	<i>1 each</i>		
<i>Grand Lodge Toronto in July</i>	<i>1</i>		
<i>Other.....</i>	<i>1</i>		
<i>10 point max</i>	<i>Total</i>		

Appendix B (9)

<u>BANQUET HOUR ORGANIZATION:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
			<p><u>Questions:</u></p> <p>Do your Lodge facilities support serving food? Do you have a written or understood banquet program? Do people linger after the Lodge meeting or leave Immediately?</p> <p><u>Mechanisms/Initiatives:</u></p> <ul style="list-style-type: none"> • Improve your food processing facilities. • Establish a rotation scheme for toasts – officers and other members • Invite speakers from other Lodges
Food at every meeting	4		
Formal Head Table at every meeting	2		
Toast at every meeting	1		
Queen & Craft			
Grand Lodge	1		
Visitors	1		
Candidate	1		
Junior Warden	1		
Guest Speaker	1		
Formal dinner for DDGM's official visit	1		
10 point max	Total		What would you <u>like</u> the score to be?

Appendix B (10)

<u>PAST MASTERS IN LINE OFFICERS' CHAIRS:</u>			
Lodge Management Element	Points	Your Score	Planning Considerations/Initiatives
			<u>Questions:</u>
No Past Master in W.M. Chair	1		Are there any non-past masters to available to assume office(s)
No Past Master in S.W. Chair	1		Are non-past masters encouraged to come forward or are they inhibited?
No Past Master in J.W. Chair	1		<u>Mechanisms/Initiatives:</u>
No Past Master in S.D. Chair	1		<ul style="list-style-type: none"> • Officer Progression Program from Grand Lodge • Set up a succession plan for future years. Charge each officer with the training of his successor. • Extend Mentoring concept to officer education
No Past Master in J.D. Chair	1		
No Past Master in I.G. Chair	1		
No Past Master in S.S. Chair	1		
No Past Master in J.S. Chair	1		
No Past Master in Chaplain's Chair	1		
Master Masons waiting to occupy chairs	3		
10 point max	Total		What would you <u>like</u> the score to be?

Appendix C - How to Hold a Lodge of Discussion

Adapted from a paper by W. Bro. Robert W. Gray, Waverley Lodge No.361, Guelph

Getting The Ball Rolling

Holding a Lodge of Discussion requires only three things:

- One moderator
- Two or three willing participants (plants or starters)
- An idea

If a Worshipful Master is willing to try out a Lodge of Discussion, the rest of the items will fall quite easily into place. The concept is not a complicated one, nor is the execution.

Once the Worshipful Master has agreed to host a LOD (Lodge of Discussion) then the moderator need only find a couple more people to attend and assist him in getting things started. Some discussion on the topics prior to the meeting would be of great benefit as the plants can also serve to keep the conversation going should it start to lag.

The last item on the list is an idea, and here, the sky's the limit. Topics for discussion are most effective if they run a little closer to the edge. Care should, of course, be taken not to offend any brother, nor cause disharmony in the lodge, but topics that are somewhat controversial in nature tend to generate more lively discussion than those based on the merits of, say, Saltine crackers over Ritz.

The Big Night – Implementation In Lodge

There are a few things to keep in mind when holding a lodge of discussion. These are guidelines rather than rules, but they have been developed over the course of a year of trial runs within lodges and come from what has worked best in that time.

1. The Moderator has the most important job of the night. It is his job to introduce the concept, to engage the brethren with the topic and to not only keep the conversation lively and active, but to diffuse any tensions that may arise from differences of opinion. It is absolutely vital that the discussions are conducted in peace and harmony.
2. The topic can make or break the evening and it is a delicate balance between a topic that can be summed up in a few motherhood statements (hockey and apple pie) and one that will divide the brethren.
3. In general, there is no time limit. The Moderator is at liberty to use his judgment based on the agenda for the evening. If the LOD is the only item after General Business, then an hour is not unreasonable. That being said, 10 minutes while the candidate resumes his personal comforts on a degree night may also be sufficient to get the brethren thinking and talking in the banquet room after the meeting.
4. Keep the atmosphere relaxed. The Worshipful Master may grant permission to suspend the use of signs and titles for the duration of the discussion, if he sees fit. Likewise, gentle humour is also a great means of making people comfortable with one another and lessens the distance across the lodge room.
5. Be flexible. Stay on topic as much as possible, but if the general consensus seems to lead down other avenues, don't be afraid to follow where it leads. It's a great way to find the pulse of the lodge and that information can be used to structure future discussions.
6. Have fun! Be creative and make the evening one the brethren will tell their friends about.

In A Nutshell...

So there it is in a few simple words. For all of the guidelines above, the greatest is this. Keep it simple! Be conscious of those things which need to be done to make the evening a success, but don't over-complicate things. It is, after all, simply a conversation amongst the brethren.