

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

Lodge Management Certificate Program
A Lodge Officers Training Tool



Introduction

The purpose of the Grand Lodge of Virginia Lodge Management Program is to provide Lodge officers with the knowledge, skills and attitude necessary to be a successful leader. The program is taught in four lessons. Each lesson, or module, will teach components that are essential in running a Lodge. Obtaining this certification will help you to be more qualified to lead the Brethren and will improve your ability to manage your activities. You will be a successful Worshipful Master better able to promote Freemasonry and strengthen your Lodge.

The modules are designed to be interactive. Please ask your instructor any questions you have regarding the material presented during the training session. Your participation and understanding of the learning objectives taught in each lesson are essential in order for you to become a more educated and capable Masonic leader, and in turn grow and strengthen your Lodge. Each section or “module” of the course is taught in 90-minute sessions.

Throughout the program are “Master Operations.” These exercises are designed to prepare you for serving in the East by completing various steps in your necessary preparation, from planning a calendar or budget to writing your trestleboard.

The course will be taught using TPI:

**Total
Participant
Involvement**

TPI requires the students and the instructor interact and participate in exercises to reinforce the learning objectives. Upon completion of this program, you will have completed laying out the majority of your Lodge plans for your year as Worshipful Master. You will also be better prepared to utilize the skills, talents and resources of your Lodge’s individual members in developing both short and long term goals to grow your Lodge.



Module I

Your Year in the East: Planning and Developing Your Programs and Activities

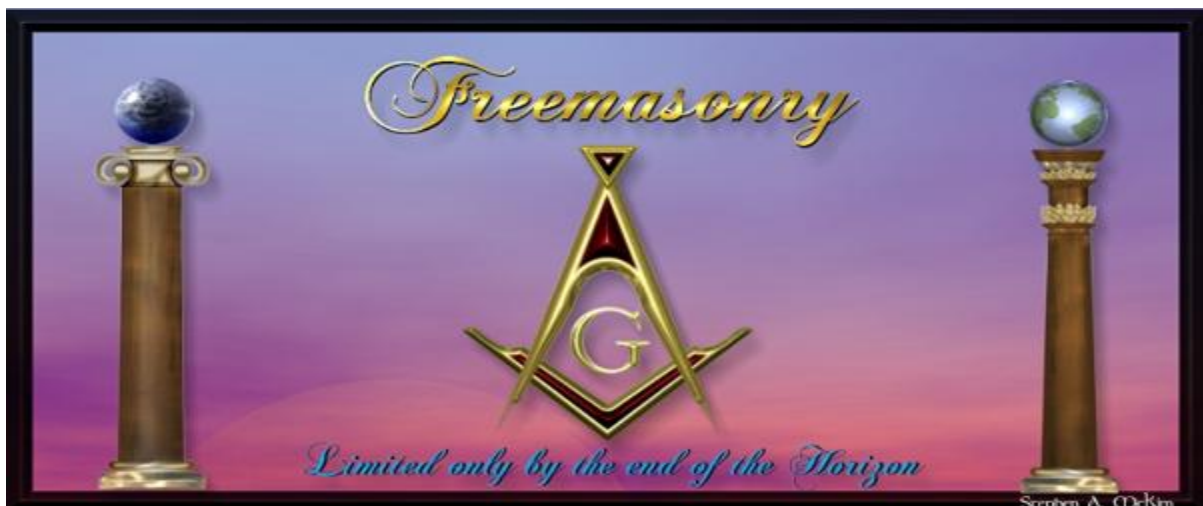
Objectives: As a result of your participation in this lesson, you will be able to create an innovative calendar and management plan for your year as Worshipful Master including:

1. A variety of speakers at each stated communication
2. Social events
3. District and Grand Lodge activities
4. Bring-A-Friend programs
5. Meeting management
6. Service opportunities

Why Planning?

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

Just as the architect must lay out his plans before the builder can begin his work, so must the Worshipful Master lay out his plans if his Lodge is to be successful. Planning requires careful thought, dedication, preparation and follow-through. Successful planning can lead to a growth in Lodge attendance and an increase in the number of petitions a Lodge receives. Likewise, a failure to plan can result in a decline in attendance, petitions and a willingness of members to serve as officers or on committees.



Lesson I: Introduction to Planning

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the importance of planning to your Lodge.
2. Name the three steps to successfully making and implementing a plan.

Lodges that do not have a planned calendar of activities will often experience:

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

Lodges that do have a planned program and calendar usually have:

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

Very simply put, planning is setting the direction for your Lodge. First, it is critical to reference the mission or overall purpose of Freemasonry and second for you and your officers to have in mind an overall purpose or result that you want to achieve this year or in the next couple of years. And once the plan is put in place, you need to have an implementation plan with clear goals and timelines if you expect to achieve results.

When planning, get input from your officers, committee chairmen, and members. Involving the Brethren in the process will make it their plan not just yours. This will create a sense of ownership. They will be more committed to the plan and more involved in its implementation. As a result, its chance of success will increase significantly.

Principles of Planning

The three key steps in planning are:

- Make Your Plan
- Work Your Plan
- Evaluate Your Plan

In this module, we will work primarily on the first step, “Make Your Plan.”

Lesson II: Program Resources

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand how to locate and utilize existing Masonic program resources
2. Implement a range of programs to address the diverse interests of all Lodge members

There are many resources available to help officers in selecting programs, speakers and Lodge activities. *Appendix I* contains a listing of resources available to assist you in creating unique and interesting events and programs.

Appendix II contains a brief bibliography listing several books that contains a wealth of information on suggested programs and Lodge activities.

Appendix III provides a variety of social, civic and fundraising events that can be conducted by a Lodge.

Remember advance planning! Brethren are usually willing to help, aid and assist you whenever possible but proper planning in a timely manner will help ensure you the ability to obtain the speakers and programs that you desire. Keep in mind the particular interests of the members of your Lodge. A variety of programs and speakers should be selected throughout the year to reflect these interests.

Non-Masonic speakers can be an important part of your program. Topics that might be presented include:

- Retirement planning
- Home security
- Men's health
- Local history
- Insurance
- Gardening
- And more...the topic is only limited by your creativity and the Lodges interests!

Inviting a Speaker

1. Make the request in writing (not E-mail) at least 60 days in advance, earlier if possible.
2. Include the date, time, dress, if a meal will be served, length of presentation, etc.
3. Clearly communicate your expectations as to what you want them to cover and how long to speak.

4. Ensure there is a point of contact for the speaker who will check if there are any special requirements (i.e., a PowerPoint presentation or DVD player) and who will provide clear directions to the Lodge and will also greet and stay with your speaker.
5. Call or E-mail the speaker 30 days before the presentation to confirm. Contact them again the week of the communication/activity.
6. Have a back-up plan for the unexpected emergency. For example, plan now to have a talk or speaker held in reserve in case a scheduled speaker fails to appear.

Types of Programs

A successful Worshipful Master should consider having three presentations (speakers) at each communication:

1. Featured speaker (15-20 minutes) – this person will be your keynote speaker. The presentation should be interesting and exciting, and perhaps motivating. Time should be allowed for questions and discussion. The “takeaway,” if possible, should be something he can talk about with his colleague or his wife when they ask him what he did at Lodge last night.
2. Educational program (5-10 minutes) – This is an excellent opportunity to involve the brethren of the Lodge. Ask a member to give a 5-minute talk on the Masonic topic of his choice. It will encourage him to do some research online or to read a Masonic article or book and report back to the Lodge. This is an important role for the brother and it will contribute to the Masonic education of the member giving the short talk and the Brethren listening to it.
3. “Let me tell you about myself.” – This presentation is given by one of the Brethren, which could be a brief autobiography or simply a talk on a hobby or an interesting life experience. The more the Brethren know about each other, the stronger the ties and the stronger the Lodge.

Helpful Tips!

- It is recommended you have the speakers give their presentations first, **before** Lodge business is conducted. This allows the Brethren to concentrate on the program(s) while they are fresh. The business portion of the communication can easily be conducted following the last presenter.
- Official visits by the DDGM, DIW, DEO and other district officers are a part of the program – **not the program**.
- Try to develop programs that are complimentary to one another. (i.e., a speaker on retirement planning the night the MAHOVA Ambassador is speaking is a good tie in)

Lesson III: Steps in Planning Your Calendar

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the components that make up a Lodge calendar/program.
2. Complete a 12-month calendar for your Lodge.

Components of a Lodge Calendar

Each Lodge will have events/activities that are unique to it. Basic components that will be a part of any Lodge calendar include:

- Meetings
- Programs
- Projects
- Social events

These components form a significant part of any annual calendar. The only restriction on the activities and programs of your Lodge is your own imagination.

Why is Advance Planning Important?

Early planning is essential in order to:

1. Ensure the Lodge facilities are available (i.e., not conflicting with other Lodge or appendent body meetings).
2. Obtain quality speakers and confirm their attendance.
3. Allow time to promote the program activity to the Lodge membership.
4. Reduce stress among officers with last minute changes/emergencies.
5. Delegate responsibilities.
6. Adequately budget for the activities of the Lodge.

Master Operation 1: Individual Lodge Calendars – Preparing for Your Year in the East!

Utilizing the blank calendar in *Appendix IV*, you will have forty-five minutes to begin to create a calendar for your Lodge. For each month you should include the following events:

- Stated communications
- District ritual schools
- Lodge ritual schools (if held regularly)
- Officer meetings
- Grand Annual Communication
- Bring-A-Friend Programs
- Division Leadership Conference and Area Ritual School (if date is available)
- Fraternal visits (one per month suggested, within or without your district)
- Social events such as ladies night, picnic, etc. (for suggestions see Appendix III)

Upon completion of this operation you will have completed a major activity – ***Making Your Plan!***



Lesson IV: Planning Your Communication (Meeting)

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the importance for having an agenda for your communications.
2. Be able to create an agenda for a communication.

Agenda: function: *noun* : a list or outline of things to be considered or done <agendas of faculty meetings>: An underlying often ideological plan or program <a political agenda>

Poor attendance at Lodge communications (meetings) is usually due to a lack of quality programs and ***no agenda!*** It is vital that the Worshipful Master work with his officers and committee chairman to create an agenda that will ensure that lodge business is conducted in a timely and organized manner.

Lodges that do not have a planned agenda often experience:

- A reduction in attendance from members who become bored
- Long meetings (2.5-3 hours or more)
- Committee meetings in Lodge (this will be discussed more in Module III)
- Failure to complete the business of the Lodge
- A decline in enthusiasm

Sample Agenda for Lodge Communications:

- **Open** - Officers
- **Pledge of Allegiance** – Worshipful Master
- **Welcome** – Worshipful Master
- **Introduction of speaker(s) and program** – Worshipful Master *and/or* appointed committee
- **Reading of petitions** (1st and 2nd, if necessary) - Secretary
- **Balloting** (if necessary) – Worshipful Master *and* Officers
- **Reading of bills** (Vote is not necessary, the WM can order they be paid) - Secretary
- **Reading of communications** - Secretary
- **Sickness & distress report** – Sick committee chairman *and* all brethren
- **Masonic birthdays** – Junior Warden
- **Introductions** – Worshipful Master *and/or* Senior Deacon
- **Committee reports** – Committee chairmen
- **Announcements** – Worshipful Master *and* all brethren
- **Summary of the minutes** – Secretary
- **Closing** – Officers

Module II

Running the Lodge

Learning Objectives: As a result of your participation in this lesson, you will be able to develop plans to ensure the future success of your lodge including:

1. 1-Year tactical plan
2. 5-Year strategic plan
3. Creating a Lodge budget

Solomon could not have built his magnificent Temple without setting goals, both short-term and long-term in order to measure his progress. Similarly, the Worshipful Master and Lodge officers should develop short-term (1-Year Tactical) and long-term (5-Year Strategic) plans. Funding these goals and the operations of the Lodge requires the creation of a Lodge budget. Financial resources (or a lack thereof) often dictate what our Lodge can do and what our goals will be. It is therefore vital that you develop a budget and plans that will support each other.

Solomon relied upon Hiram, King of Tyre, to provide the financial support and advice in completing the Temple. So must you, as Worshipful Master, provide leadership in developing and implementing a budget that will provide for the expenses of your Lodge. The most well-planned calendar cannot be implemented if there is not a budget to meet the costs it incurs. Much of this work will be done while you are serving as Senior Warden and will require the assistance of the Treasurer and Secretary in reviewing income and expenses.

In this training module you will learn the importance of budgeting, the relationship between income and expenses, and the necessity to forecast long-term budget needs.

Lesson I: Tactical vs. Strategic Planning

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand what a 1-Year Tactical Plan is.
2. Understand the value and use of a 5-Year Strategic Plan

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

A *1-Year Tactical Plan* is designed to develop objectives that can be met in one calendar year. These objectives should be met utilizing the calendar you developed in Module I and through the efforts of the Lodge officers, committees and members. Examples of objectives that would be included in a *Tactical Plan* include:

- Increased attendance at stated and called communications
- Decrease in the number of members suspended for Non-Payment of Dues (NPD)
- Increase the number of family activities sponsored by the Lodge
- Improving communication with Masonic Widows
- Holding monthly officer meetings to improve communication
- Doing minor building improvements
- Increasing the number of Life Members in Perpetuity (LMIP)

The Worshipful Master should meet with his officers and committee chairmen to set the goals in the *1-Year Tactical Plan*. He should then make sure they are signed to the appropriate officer/committee chairman to implement.

The *Tactical Plan* should be reviewed at the monthly Lodge officer meeting to see how the goals are being met and adjusting them as needed.

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

A *5-Year Strategic Plan* should be crafted by a Strategic Planning and Finance Committee. It should be chaired by the Worshipful Master and could include the Trustees, Secretary and Treasurer. Other officers and members should be encouraged to attend and participate in committee meetings.

This committee has five major functions:

1. **Developing a Master Plan:** The Committee should look five to seven years in the future to forecast trends and identify opportunities. The Committee should advise the Lodge what it can expect in terms of membership, finances, and expenditures. It should identify the issues the Lodge will need to confront, the problems the Worshipful Master will need to solve, and the programs that will have to be put in place.

The first time around, the Committee will propose a strategic plan. In subsequent years, it will evaluate the plan; propose revisions as appropriate, and track progress toward implementing the plan.

2. **Raising Money:** The Committee should periodically assess the adequacy of the dues structure against needs, encourage and design gift programs with suitable incentives such as buying a chair or being recognized on a wall plaque, encourage and facilitate trusts and bequests, promote perpetual memberships for existing and deceased members, and develop ideas for raising funds.

3. **Investing Funds:** The Committee could review investment options (CD, mutual funds, other investments), and review how much or little risk should be tolerated in the context of fiduciary responsibilities to safeguard Lodge funds.

4. **Apportioning Money:** The Committee should review existing budgets, suggest ways to promote greater efficiency, and suggest setting up dedicated funds, for example, for Masonic charity, scholarships, building repair, and capital improvements.

5. **Prioritizing Expenditures:** The Committee should establish repair and capital improvement priorities and suggest a spending plan.

6. **Establishing Membership Goals:** The committee should review Lodge membership trends and set appropriate goals for membership growth in conjunction with the Lodge Membership Committee.

So it is important that we **do strategic planning at the Lodge level** to ensure that you understand where your Lodge stands from a financial and membership standpoint. Once this is understood, you can plan, set concrete goals and take action.

The Grand Lodge of Virginia has purchased a **strategic planning tool** that was developed by a Mason in Minnesota which can help you to assess where your Lodge will be in 5, 10, 15, or 20 years, if your current trends continue and help you evaluate what you need to do to improve that trend line. You can obtain training in utilizing this tool by contacting???

Lesson II: Introduction to Budgeting

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the importance of budgeting for your Lodge.
2. Understand the relationship between income and expenses.

Lodges that do not have a budget will often see:

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

Lodges that do have a budget usually have:

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

A budget should be used in every Masonic Lodge. Budgeting is necessary to attain your desired goals and to keep your planning within the realm of reality. It requires a systematic evaluation of estimated income and expenditures to ensure that funding will be available for programs, activities and building maintenance. When budgeting, get input from your officers, committee chairmen, and members.



Income vs. Expenses

Income includes the funds (money) the Lodge receives from degree fees, dues, fundraisers, investments, rental fees from other organizations, etc. (See Appendix V)

Expenses are those items which must be paid for by the Lodge, i.e., Grand Lodge dues/assessments, utility bills, building maintenance or rental fees paid by the Lodge, meals/refreshments at Lodge activities, etc. (See Appendix VI)

If the Lodge does not generate enough income to cover its' expenses, the end result will be a deficit. While a Lodge may occasionally have a calendar year with an operating deficit, continuing this practice will eventually result in a severe negative financial situation. This situation could include a loss of Lodge investments/reserves, ability to maintain the temple/Lodge hall and possibly result in the closing of the Lodge due to its inability to meet expenses.

It is therefore necessary, in creating a budget, that enough income be produced to cover the expenses incurred. This requires a careful analysis and planning for each Lodge activity to ensure that an adequate and accurate budget is developed.

Any new activity/program the Lodge adopts should be budgeted for and the income source that will pay for it is identified before it is implemented. Prior evaluation of income/expenses will enable the officers and the Lodge the ability to make an intelligent decision based on facts instead of conjecture and assist in reducing the potential for a deficit.

Principles of Lodge Budgeting

- Expenses should not exceed income
- An emergency fund should be maintained (for losses not covered by insurance, brethren in distress, etc.)
- Degree fees/dues should be adjusted, at a minimum, to compensate for inflation
- Long-term investments to improve the Lodge's financial strength (such as the *Life Membership in Perpetuity* program) should be promoted and planned for
- Planning for any activity should include developing a budget
- The Lodge should solicit donations for special projects/expenses



Lesson III: Planning Your Budget

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand how to determine your Lodge's annual income.
2. Develop a budget that reflects the actual expenses of your Lodge.

In order to begin planning your budget it is necessary for you to understand what your Lodge's actual income and expenses are on an annual basis. Membership will play a large factor in determining your income. Dues and degree fees will in most cases be the largest source on funds for your Lodge. In situations where there is not enough income to cover Lodge expenses, other revenue will need to be generated from fundraisers, building rental, etc.

Prior to attending this lesson, you should have met with your Lodge Secretary and completed Basic Lodge Income Form and Basic Lodge Expenses Form (see Appendix VII). Using these two forms, you will complete *Master Operation 2: Developing Your Lodge Budget*.

Master Operation 2: Developing Your Lodge Budget

Utilizing the budget worksheet in Appendix VIII, you will have forty-five minutes to create a budget for your Lodge. You will need to include the expense and income information from the Basic Lodge Income Form and Basic Lodge Expense Form.

In addition to this information, for your budget make sure to include:

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

Lesson IV: Budgeting “Outside the Box”

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand alternative means of program/budget funding.
2. Find creative solutions to budget constraints.

In completing the budget worksheet you will have determined if your lodge is operating within its expenses or if you are creating a *deficit*:

Deficit:

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

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

There are several alternative means to create additional revenue to prevent a deficit:

- Brethren who participate in an activity can bear the cost. For example, if the Lodge is attending a baseball game the tickets are ordered collectively to obtain a group rate with each member reimbursing the lodge for his individual ticket(s).
- Deposits can be obtained for dinners/special activities. This will reduce the number of “no-shows.”
- The Lodge can hold more fundraisers to increase revenue. Many Lodges do not conduct any type of fundraising and are losing out on a lucrative source of income. Of course, all fundraisers must be conducted in accordance with the Methodical Digest.
- The Lodge should examine encouraging wills and bequests from its own members to cover major expenses/develop investment opportunities for the Lodge to grow financially.

If you still cannot bring in more income to cover your expenses get creative! Lodges need to think of sources of income that will be consistent and worth the time involve generating them.

Creative solutions may include:

- Conducting joint activities with a nearby sister Lodge to split expenses
- Soliciting Lodge members to maintain the grounds/building to eliminate contractor costs

- Developing a Life Membership in Perpetuity Committee to encourage brethren to take part in this vital program. Committee can provide information to members; assist Secretary in maintaining a monthly payment plan for brethren, etc.
- Give “naming rights” to brethren who make significant contributions, i.e., a Brother donates \$20,000 for building upgrades and the anteroom or fellowship hall is named for him. It can be in honor (for living members) or in memory (for deceased members - from a bequest or family donation). This concept can also be used for smaller cost items such as new chair purchases, tables, etc.
- Create special investment accounts for Lodge charitable projects for brethren to donate to. Once these accounts grow to a designated amount they will be able to pay for the specified endeavor. This will free up more Lodge funds to pay for other expenses

Creativity will ensure your Lodge is financially sound and capable of carrying out its obligations and responsibilities! You have now completed your budget – put it in action and you will have completed another task in building a successful Lodge.



Module III

Building Your Lodge Leadership Team

Learning Objectives: As a result of your participation in this lesson, you will be able to utilize the skills and resources of your Lodges individual officers and members to:

1. Strengthen your line of officers
2. Create a viable committee structure
3. Utilize both Grand Lodge and the District Team to support your Lodge

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

Lesson I: Creating a Stronger Line of Officers

Learning Objectives: As a result of your participation in this lesson, you will be able to:

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

Officer: Function: *noun:* one who holds an office of trust, authority, or command

Selecting and nominating your officers is one of the most important things you will have to do when you are elected Worshipful Master. Several items to keep in mind include:

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

How do I select my officers?

Once you have been elected to the line as Junior Deacon, you should keep the following in mind:

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

Signs that an officer may not advance/succeed as Worshipful Master:

- Is not learning the ritual
- Does not show leadership potential
- Is causing division in the Lodge

If you see any of these signs then you need to speak with that officer and try to solve the issue(s). In no case should the officer be surprised if you make a decision not to advance him. To resolve any issues you may want to consider the following:

- Determine exactly what the problem is
- Decide if the officer simply needs more time to learn and prepare and perhaps should remain in his current office for another year

- You will need to explain to the brother how he needs to improve
- If the officer does not improve and does not wish to step aside, you should consult with the Worshipful Master and Past Masters to try to gain a consensus on what to do
- Review your options and weigh the benefits of keeping him in line vs. removing him from line

Maintaining a Strong Line

In order to maintain a strong line of officers and to improve communication and mentoring you should consider doing the following:

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

Lesson II: Creating Viable Committees

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the importance of committees to your Lodge.
2. Understand the proper use of committees in planning and reporting on Lodge programs and activities.

Committees serve an important role by getting more brethren involved in the planning and operation of the Lodge. They particularly serve a vital role in developing recommendations for the Lodge to act upon. In turn, the brethren who serve on these committees will develop a stronger bond among themselves and with the Lodge. Officers serving as chairman on some of the committees will also help prepare them to be more successful Worshipful Masters.

Many Lodges have too many committees that are ineffective or do not utilize any committee system.

At a very minimum, it is recommended that you have four committees:

1. **Strategic Planning and Finance Committee** – you will learn about this committee in-depth in Module II. It is chaired by the Worshipful Master.

2. **Masonic Family Committee** – this committee will promote Masonic Family activities (other Masonic organizations that meet in the same building or area). This committee can also coordinate the Lodge picnic, Ladies Night, Child ID programs, etc. Its mission should be to promote social activities both within the Fraternity and with our families.

This committee could be chaired by the Senior Warden and include the Stewards, Chaplain, Marshal and other active Brethren.

3. **Membership Committee** – this committee will help ensure that all Brethren know about the candidate information available from Grand Lodge such as the “For Your Information” brochure and assist with conducting “Bring-A-Friend” programs. The committee can help educate the membership on what is appropriate to discuss with a prospective candidate.

The committee should also keep in regular contact with Masonic Widows and brethren. They should utilize a phone tree system to check on the Brethren, their families and the widows. By doing this they will be able to report on any sickness and distress and possibly reactivate inactive members.

This committee could be chaired by the Junior Warden and a mixture of older and young members in the Lodge. Many of the older members will be glad to assist with the phone calls and other communication.

4. **Lodge Operations Committee** – this committee is responsible for a variety of activities essential to the Lodge such as: building and grounds maintenance, investigation of petitions, catechism instruction, Lodge ritual instruction and Lodge leadership and education programs.

This committee could be chaired by the Senior Deacon and consist of several Past Masters, Lodge Instructor of Work, Lodge Education Officer and other experienced Brethren.

These are only suggestions for a minimum number of committees. In a larger or stronger Lodge you may divide the duties of these four into a larger number of committees. What matters most is that the committees serve a purpose and provide a service to the Lodge. In selecting the chairmen it is vital that he be interested in the committee’s role and will serve as a leader to the members of the committee.

Committee chairmen should provide a report at each stated communication. It should be brief and concise.

Master Operation 3: Preparing a Committee Report

Utilizing the blank committee report in *Appendix IX*, you will have 20 minutes to create a committee report for your Lodge. The following scenario will be used:

Old Dominion Lodge No. 400 wishes to have a picnic. Your committee has been tasked with planning it. You will need to take the following into consideration:

- Date and location
- Cost (budgeted or will there be a fee?)
- Food (what will the Lodge provide/what will members need to bring?)
- Publicity
- Who is invited
- Widows
- Volunteers to cook? Serve? Clean-up?

Remember that your recommendation should be a summary of your discussion. It should tell the who, what, when and where. Several of you will be called upon to give your report to the “Lodge.”

Lesson III: Utilizing Grand Lodge and District Team Resources

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the resources available from Grand Lodge.
2. Understand the role of the District Team.

Grand Lodge Resources

Grand Lodge provides a large variety of resources to the subordinate Lodge and Mason, including:

- *Reid Simmons Academy* – annual program where brethren can attend Masonic ritual or education classes.
- *Division Leadership Conferences* – annual program where brethren can attend classes on officer training, Masonic education and meet with their counterpart in the Grand Line.

- *Grand Lodge Library and Museum* – besides an archive for the history of our Craft, the library does Masonic research for a very nominal fee.
- *Masonic Relief Fund* – provides financial support to Brethren in extreme distress. All requests must be made through the Lodge to the Committee on Masonic Relief.
- *Grand Lodge Scholarship Fund* – provides renewable college scholarships to worthy young men and women.
- *Masonic Home of Virginia*- provides a home for senior Master Masons, their wives and widows.
- *Grand Lodge Web Site* – provides schedules, links to other Lodges in Virginia, informational sketches.
- *Grand Secretary's Office* – maintains statistical records of all subordinate Lodges, prints all Grand Lodge publications.
- *Masonic Herald* – official publication of the Grand Lodge of Virginia. Includes educational articles, Masonic history, Lodge program ideas and more.
- *Lodge Viability Tool* – this valuable tool allows Lodges to project what their membership will be in 10, 15, 20 years or more if current Lodge trends remain constant (i.e., number of members raised, deaths, etc.) . It is valuable in developing your 5-Year Strategic Plan, both for membership and the lodge budget.
- *Committee on Masonic Education* – this committee is developing a series of presentations that can be used as Lodge programs and downloaded from the Grand Lodge web site. The programs will be in “spoken English” and should be of great value, either as a substitute program or as the featured program.
- *Committee on Lodge Services* - this Committee shall support and assist the Grand Lodge to provide mentoring and “in Lodge” service to Lodges who request help in the areas of Solvency and Viability Review Assessment; strategic planning; finances and fund raising; membership programs; Lodge programs and meeting quality; and Lodge revitalization. The Committee will serve as the Grand Lodge repository of Lodge operations “best practices” (programs, activities and procedure that result in exceptional Lodge operations) and share such practices with all Lodges. Its also shall evaluate and make recommendations to the Grand Master on all request to charter new Lodges and close or consolidate existing Lodges.
- *Committee on Marketing, Outreach and Public Relations* - this Committee will develop a program to increase public understanding of Virginia Freemasonry and create a more favorable opinion of the organization through press releases, print and electronic articles, and interviews.

The District Team

Your District Team consists of the District Deputy Grand Master, District Instructor of Work, District Education Officer, District Masonic Home Ambassador and District Blood Coordinator. Each has a vital role in your district and in supporting your Lodge.

District Deputy Grand Master – the DDGM is appointed by the Grand Master as his personal representative in the district. He is the “eyes and ears” of the Grand Master. His responsibilities include promoting the Grand Masters programs and goals. The DDGM is the Worshipful Masters first point of contact for matters involving Masonic law, trials and policies. He also can issue dispensations to move a communication due to weather (snow, flood, etc.). The DDGM will make an official visit to your Lodge and will attend at least four other communications over the calendar year.

District Instructor of Work – the DIW is appointed by the Grand Master upon the recommendation of the Grand Lecturer. It is his duty to assist in training the brethren in the district in the ritual of the three degrees and Masonic ceremonies. The DIW can often serve by providing a short program on the ritual, assisting with setting up catechism classes and with finding brethren to perform a Lecture or fill in for a part that is needed.

District Education Officer – the DEO is appointed by the Grand Master upon recommendation of the Grand Provost. He assists in coordinating the Division Leadership Conference in his respective area and serves as an educational resource by providing district and Lodge programs. The DEO is often a good source for obtaining speakers, Masonic books of interest and more. He also can be of assistance in explaining the use and concept of the Alternative Method program for advancement.

District Masonic Home Ambassador – this Brother is appointed by the Grand Master upon the recommendation of the Chairman of the Committee on Masonic Home Ambassadors. His role is to promote giving to the Masonic Home, explain admissions and promote the Home in general. The District Ambassador is a good source for short programs about the Masonic Home.

District Blood Coordinator – the Blood Coordinator is responsible for promoting the blood donor program to the subordinate Lodges. He is appointed by the Grand Master upon recommendation of the Chairman of the Grand Lodge Committee on Masonic Community Blood Program. He reports all Lodge donations to the Grand Lodge. This Brother can often provide short programs on donating blood products and in many cases on current health issues.

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

- All are appointed by the Grand Master at his sole discretion
- They are there to serve – by utilizing them in a short program you will help promote the programs of the Grand Lodge, Masonic ritual and education and more!
- The District Team should coordinate their visits with the Worshipful Master

Module IV

Developing and Implementing Your Membership Goals

Learning Objectives: As a result of your participation in this lesson, you will be able to understand the importance of establishing membership goals including:

1. Retention and mentoring
2. Reducing number of Brethren suspended for NPDs
3. Life Membership in Perpetuity (LMIP)
4. Opportunities to educate non-Masons about the Fraternity

During the construction of Solomon's Temple our attention is drawn to the fact that Solomon employed thousands of Entered Apprentices and Fellowcrafts, all overseen by the Master's to complete the magnificent structure. Similarly, in a Masonic Lodge the health, growth and structure can only be sustained by a vibrant membership.

Membership goals for a Lodge extends much farther than simply raising new candidates; it includes membership retention, mentoring and providing new and older members with a purpose for being active in the Craft. Your ability to attract and retain members will be a major contributor to the success or failure of your Lodge.



Lesson I: Understanding the Importance of Membership Retention

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the role that membership retention and mentoring plays in the Lodge.
2. Understand the importance of reducing the number of members suspended for NPDs.

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

The average Lodge in Virginia will have:

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

In order to experience a positive growth in membership you must first learn what is needed to retain new members (and older ones!). Members need to feel there is “value” in attending Lodge communications and activities. They must be organized, appropriate in length and of interest to the members.

National surveys have shown that a new member in an organization will either become inactive or quit within six (6) months if they do not feel they have any responsibility/job in the organization. All members need to be mentored to help them understand their role, responsibilities and opportunities in the Lodge.

New members should be mentored by several individuals: the two Brethren who signed his petition; the catechism or alternative method coach; and finally, another Brother appointed by the Worshipful Master. By having four mentors we will help ensure the new member develops a relationship with brethren he did not know before entering the Lodge as well as strengthens his relationship with the members he knew before approaching the West Gate.

New members should be mentored in:

1. Lodge protocol (balloting, addressing the Master, arriving late/leaving early, etc.)
2. Masonic vocabulary (titles, phrases, etc.)
3. Appropriate dress
4. District and Grand Lodge activities (district ritual schools, Reid Simmons Academy, etc.)
5. Masonic charities (*Masonic Home of Virginia, Grand Lodge Scholarship Fund, Masonic Relief Fund* and any particular charities of the subordinate Lodge such as a scholarship, charity fund, etc.)
6. Importance of assisting Masonic Widows and brethren in distress

In addition, all members should be:

1. Assigned to a committee that interests them (i.e., a new member that enjoys cooking may serve on the Stewards committee, while a member that is an accountant may wish to serve on the Audit committee)
2. Encouraged to assist with degrees (memory work if they have an interest and the ability to retain the memory work, non-speaking roles including candidate preparation for those who are not comfortable exemplifying the work)
3. Communicated with on a regular basis by one or more of their mentor's
4. Educated that Freemasonry feels his faith, family and career come first in importance
5. Recruited to become a Lodge officer, not coerced

Older members may also need additional mentoring by:

1. Lodge communicating with brethren who have retired and moved out of state to check on their physical and financial health
2. Visitations from members to those who are bed ridden due to health issues
3. Finding a role for them to play in the Lodge that is not as physically demanding, i.e., chair Widow's committee, make calls for phone tree, etc.

Lodges can help reduce the number of members suspended for NPD's by:

1. Maintain regular communication with the member
2. Educating the member about the benefits of Masonic membership
3. Maintaining a mentoring program for all members and all ages
4. Sharing human interest/positive stories with the membership, i.e., Lodge helping a widow with the lawn maintenance, member admitted to the Masonic Home, etc.



Master Operation 4: Lodge Viability Tool

The class will divide into two groups. The Lodge of one of the attendees in each group will be selected as the “sample” Lodge. In this group you will have 25 minutes to:

- Examine the current Lodge trends
- Look at the effects of 0, 2, 5, 10 and 15 members a year being raised will have on the entire membership
- Review how age demographics effect your Lodge
- Learn how to properly use the *Lodge Viability Tool*

Lesson II: The Life Membership in Perpetuity Program

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand what the Life Membership in Perpetuity Program is.
2. Understand the impact the LMIP program can have on your budget and reduction in members suspended for NPD's.

The Life Membership in Perpetuity (LMIP) program was created by the Grand Lodge of Virginia to allow members to pay a one time fee that will eliminate the need to pay yearly dues. The fee can be paid in full or can be paid in installments to the Secretary of the Lodge. Once a member pays the LMIP fee in full, the total is sent to the Grand Lodge of Virginia and the Brother becomes a Life Member in Perpetuity (see Appendix X).

Life Members in Perpetuity avoid future dues increases while insuring the financial strength of your Lodge. The Lodge receives a portion of LMIP dues from Grand Lodge annually; even after a Brother has laid down his working tools!

Memorial Life Membership can be purchased for any Virginia Mason who was in good standing at the time of his death.

To become a LMIP, Brethren must:

1. Have paid the current dues for the year
2. Pay the sum of sixteen (16) times the annual dues of the Lodge plus all Grand Lodge fees and assessments at the time of the application, i.e., if Lodge No. 5000 has annual dues of \$42.00 + \$28.00 in Grand Lodge fees and assessments, the LMIP fee would be \$1,120.00
3. Maintain their good standing in any other Lodge they are a member of

Once the LMIP is paid:

1. The member is never assessed dues again in the Lodge(s) where he is an LMIP
2. The Lodge will receive the amount of annual dues for the member (in the example above, the lodge will receive \$42.00 per year in perpetuity)
3. The LMIPs are credited on the Lodge Annual Return; if the amount of income from LMIPs exceeds the total payment due the Lodge is sent a check from Grand Lodge

The Lodge benefits from the LMIP program by:

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

Lesson III: Educating Non-Masons About the Fraternity

Learning Objectives: As a result of your participation in this lesson, you will be able to:

1. Understand the opportunities to educate non-members (profanes) about Masonic membership
2. Understand the importance of the Bring-A-Friend program and other resources available from Grand Lodge

While Freemasonry in Virginia does not permit outright solicitation of new members, our Grand Lodge does permit a carefully worded approach to non-Masons regarding their interest in joining the Fraternity. What does this mean?

First, let us remember the requirements for membership:

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

If a prospective member meets these requirements, and you feel he would make a good candidate for the Craft you should present him with a “***For Your Information***” brochure. You may also want to include some other brochures (see Appendix XI). You may also want to refer him to the Grand Lodge website. Possible candidates may include family members, co-workers, church or synagogue members, etc.

Once the candidate has reviewed these materials you should ask him if he has any questions regarding Freemasonry. The mission, purpose and history of the Fraternity can and should be discussed. The only “secrets” in our Fraternity is the conferral of degrees and our signs and modes of recognition. *What we believe is not a secret!* You should explain our charities, the history of your Lodge, etc. At this point, you may refer him to one or more Masonic books that he can read/review (see Appendix XII).

At this point, if he is interested, the candidate will most likely ask for a petition. It must be signed by two Master Masons. If he does not know another Mason you should encourage him to attend open Lodge events, i.e., dinners, bowling party, picnic, etc., so he can develop other relationships and obtain another sponsor. By following this approved procedure, your Lodge should attract petitions from qualified candidates.

Bring-A-Friend Program

The Lodge Bring-A-Friend Program is designed to provide the Lodge with an opportunity to educate non-Mason and their families about the Fraternity. It is usually performed in the Lodge room.

The program may be presented by an individual or a combination of officers and members. The Grand Lodge of Virginia has prepared two versions of the Bring-A-Friend Program (see Appendix XIII), one for use by a single presenter and another for multiple presenters. It is an excellent outreach program.

Successful Bring-A-Friend Programs will include:

- Presenter(s) reviewing the Bring-A friend script
- Provision for refreshments
- Written invitations to prospective candidates
- Appropriate Masonic brochures and handouts
- Brethren on hand to answer questions
- A tour of the Lodge building

Lodges that use this program have seen a dramatic increase in the number of petitions received!

APPENDIX I

Organization Program Resources

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

Address: 4115 Nine Mile Road, Richmond, VA 23223-4926

Phone: 804-222-3110

E-mail: grandlodge@rcn.com

Web site: <http://www.grandlodgeofvirginia.org/>

Summary: The Grand Lodge of Virginia website includes information on Masonic charities in Virginia that can be utilized for short 3-5 minute presentations in Lodge. It also includes the mission statement for Grand Lodge, historical sketch of the founding of Grand Lodge, listing of Grand Lodge officers and links to subordinate Lodge websites. The Grand Provost, an officer appointed annually by the Grand Master, is chairman for the Grand Lodge Committee on Masonic Education and both he and the committee are excellent sources for speakers and program ideas. The Grand Provost's contact information is available on the site. The Grand Lodge Museum and Library are maintained at the Grand Lodge headquarters building. The library can perform limited research on Virginia Masons by e-mailing library@grandlodgeofvirginia.org

Virginia Research Lodges

Address: See Lodge Secretary

Phone: See Lodge Secretary

E-mail: See Lodge Secretary

Web site: See Lodge Secretary

Summary: Virginia has four (4) chartered Research Lodges. These Lodges meet several times a year where a member or guest speaker on a Masonic subject gives a presentation; they do not conduct any degree work and are only open to membership by affiliation. Each of these Lodges can provide program suggestions/speakers throughout much of the Commonwealth. The four research Lodges in Virginia are: Peyton Randolph Lodge No. 1774, Virginia Lodge of Research No. 1777, A. Douglas Smith Lodge of Research No. 1949 and Civil War Lodge of Research No. 1865. Your Lodge Secretary can provide you with the latest contact information for these Lodges.

Masonic Service Association of North America

Address: 8120 Fenton Street, Silver Spring, MD 20910-4785

Phone: 301-588-4010

E-mail: msana@ix.netcom.com

Web site: <http://www.msana.com/>

Summary: The Masonic Service Association of North America (MSANA) was formed in 1919 to provide services to its member Grand Lodges that they would find difficult to provide for themselves. Thus the national voice that the MSA has is dedicated to service to the Masonic community. The MSA has free catalog of publications, bulletins and other materials available and manages *the Masonic Information Center* to provide information on Freemasonry to Masons and non-Masons alike and to respond to critics of Freemasonry. It also publishes the *Short Talk Bulletin*, an excellent publication that provides a wealth of information on various Masonic subjects that would be appropriate for Lodge programs.

George Washington Masonic Memorial

Address: 101 Callahan Drive, Alexandria, VA 22301

Phone: 703-683-2007

E-mail: N/A

Web site: <http://www.gwmemorial.org/>

Summary: Dedicated to the memory of George Washington-Patriot, President, Mason - the Memorial was dedicated on May 12, 1932, as an expression of the Masonic Fraternity's faith in the principles of civil and religious liberty and orderly government. The memorial is open for tours seven days a week from 9:00 A.M. – 4:00 P.M. The GWMM can provide a speaker to Masonic Lodges in Virginia on this magnificent building and/or on George Washington as a Master Mason.

Hiram's Oasis

Address: N/A

Phone: N/A

E-mail: Webmaster@kena.org

Web site: <http://www.kena.org/Hirams/default.htm>

Summary: Largest collection of Masonic files anywhere on the Internet. Contains a collection of more than 4,000 Masonic-related files and documents, facts and speeches. Also contains more than 5,000 Masonic-related pictures and images. Maintained by Kena Temple Shriners.

Grand Chapter Royal Arch Masons of Virginia

Address: 4101 Nine Mile Road, Richmond, VA 23223-4999

Phone: 804-222-9120

E-mail: grsec@virginiaroyalarch.org

Web site: <http://virginiaroyalarch.org/>

Summary: Homepage for the Grand Chapter Royal Arch Masons in Virginia, part of the “*York Rite*.” Grand Secretary can assist in providing speakers on Royal Arch Masonry. Includes brief historical information.

Grand Commandery of Knights Templar of Virginia

Address: 4101 Nine Mile Road, Richmond, VA 23223-4999

Phone: 804-226-8027

E-mail: vacomdry@msn.com

Web site: <http://users.sitestar.net/~mfulcher/GCVA.htm>

Summary: Homepage for the Grand Commandery of Virginia, part of the “*York Rite*.” Contains an interesting section on history and archives that could be utilized for short Lodge programs. Grand Recorder can assist in providing speakers on Commandery.

Grand Orient of Virginia, Ancient and Accepted Scottish Rite

Address: N/A

Phone: N/A

E-mail: jcanard@cox.net

Web site: <http://www.aw22.com/vasr/home.htm>

Summary: Homepage for the Orient of Virginia, A.A.S.R. Contains several programs under its "Educational Talks" section and a history of Scottish Rite in Virginia. Includes links to the various "Valleys" (local organization) in Virginia who can be contacted to provide speakers on the Scottish Rite, its charities and patriotic themes.

Scottish Rite Research Society

Address: 1733 16th St. NW, Washington, D.C. 20009-3103

Phone: 202-777-3110

E-mail: srrs@srmason-sj.org

Web site: <http://www.srmason-sj.org/web/srrs.htm>

Summary: The SRRS is one of the most dynamic forces in Masonic research today. Produces Masonic books and publications. Excellent source of program ideas/speakers. Annual publication *Heredom* is full of well-researched articles on various Masonic subjects.

National Sojourners, Inc.

Address: 8301 East Boulevard Drive , Alexandria, Virginia 22308-1399

Phone: 703-765-5000

E-mail: nationalsoj@juno.com

Web site: <http://www.nationalsojourners.org/>

Summary: National Sojourners, Inc., is a national fraternal organization meeting the needs of military Masons and advancing programs that promote love of country. Web site lists several programs that can be used in Lodge at <http://www.nationalsojourners.org/programs/>. This page includes contact information to arrange for a presenter to come to your Lodge and conduct the program.

APPENDIX II

Bibliography

Available from: Macoy Publishing & Masonic Supply Company, Inc.
3011 Old Dumbarton Road
Richmond, VA 23228
Office: 804-262-6551 **Fax:** 804-266-8256
E-mail: info@macoy.com

Freemasonry at the Top, John E. Beuamont

Masonic Action Teams, Ronald J. Cottman **ISBN 0-88053-098-7**

The Search for Leadership, Allen E. Roberts

Macoy's Worshipful Master's Assistant, Macoy, Roberts, et al.

Designs Upon the Trestleboard, Arthur R. Herrmann

Available from all major bookstores or Amazon.com:

Freemasons for Dummies, Christopher Hodapp **ISBN 0-76459-796-5**

Idiot's Guide to Freemasonry, S. Brent Morris, **ISBN 1-59257-490-4**

Available from: J.P. Luther Co.
P.O. Box 344
173 South Pearl St.
Berlin, WI 54923
Office: 1-800-558-8292 **Fax:** 1-800-842-9357
E-mail: jpl@vbe.com

3-5-7 Minute Talks, Elbert Bede

5-15 Minute Talks, Elbert Bede

APPENDIX III

Sample Social, Civic and Fundraising Activities

Sample Lodge Social and Civic Activities

- Community Builder's Award Presentation
- Eagle Scout and Gold Scout Certificate Presentation
- Scholarship Award Presentation
- Lodge Picnic
- Dinner Theater
- Ladies Night
- St. John's Worship Service
- Blood Drives
- Child ID Programs
- Special Widow's Program
- Masonic Family Day (Masonic Home of Virginia)
- Visit a Masonic Youth Organization (Job's Daughters, Rainbow or DeMolay)
- Habitat for Humanity Project
- Attend a Professional Sporting Event
- Fishing and/or Hunting Trip
- Golf Tournament
- Skeet/Trap Shoot
- Bowling
- Adopt-A-Highway Program
- Visit A Veteran's Home

Sample Fundraising Activities

- Auction
- Breakfast
- Car wash
- Spaghetti feed
- Yard sale
- Fish fry
- Oyster roast
- Pig roast
- Cookbook (prepared by Lodge members and their wives)
- Anything not prohibited by our moral obligations or the Methodical Digest!

APPENDIX IV

Annual Calendar

Insert your plan outline for the year here.

APPENDIX V

Sources of Lodge Income

Income Sources may include:

- Dues
- Degree fees
- Fundraisers (See Student Module I, “Planning”)
- Investments/Endowments
- Life Memberships in Perpetuity
- Rental fees (from other organizations/groups)
- Donations
- Sale of stocks or bonds

APPENDIX VI

Typical Lodge Expenses

Typical Lodge Expenses May Include:

- Temple/Lodge hall maintenance
- Property (grounds) maintenance
- Rent (if building is not owned)
- Utilities
- Insurance
- Salaries and associated taxes (secretary, tiler, etc.)
- Trestleboard printing and mailing
- Grand Lodge assessment
- Food or refreshments
- Secretary supplies (envelopes, stationary, etc.)
- Meeting notices (classified advertising)
- Charitable donations
- Maintaining/upgrading Lodge officers' regalia and paraphernalia
- Maintaining/upgrading Lodge members' aprons
- Support of youth organizations
- Flowers/gifts/get-well cards

APPENDIX VII

Basic Lodge Income and Expense Forms

Basic Lodge Income Form

<i>Source of Income</i>	<i>Quantity</i>	<i>Amount Each (\$)</i>	<i>Total (\$)</i>
Member Dues			
LMIP		N/A ¹	
Degree Fees			
Building Rental Fees			
Investments		N/A ²	
Fundraisers		N/A ³	
Other (explain below)			
		<i>Total Income =</i>	

Other (explanation): _____

Notes:

1. The amount a Lodge receives for each Life Member in Perpetuity will depend on what the dues structure was at the time the LMIP was paid. The total number of LMIPs and the total amount received by the Lodge each year as a result of this number are important to the budget.
2. Investments may be in a variety of accounts and may be have restrictions on their use. For this exercise only include investments that are used for the operation of the Lodge, i.e., building maintenance, utility bills, etc. Investments that are restricted for certain items such as scholarships should not be included.
3. The amount raised at fundraisers can vary greatly. The total generated by fundraisers in the previous year is the critical information needed.

Basic Lodge Expense Form

<i>Disbursements (Expense)</i>	<i>Quantity</i>	<i>Amount Each (\$)</i>	<i>Total (\$)</i>
Grand Lodge Assessment	N/A	N/A ¹	
Utilities	N/A	N/A ²	
Rent (if building not owned)			
Temple/Lodge building maintenance³			
Grounds maintenance³			
Insurance			
Salaries and associated taxes (secretary, tiler, etc.)			
Trestleboard printing and postage			
Food or refreshments			
Secretary supplies			
Meeting notices (classified advertising)			
Charitable donations			
Degree paraphernalia/candidate supplies			
Lodge officer/member paraphernalia and aprons			
Support of youth organizations			
Flowers/gifts/get-well cards			
Other (explain below)			

Other (explanation): _____

Notes:

1. Grand Lodge assessment includes all fees and charges paid for each member to Grand Lodge on an annual basis. It can vary from year to year depending on the total number of members, candidates raised, etc.
2. Utilities will vary from season to season. Generally, the previous year will provide a good indication of the annual utility expense, minus any increases by public utilities.
3. Both building and grounds maintenance will need to include monthly and annual expenses.

APPENDIX VIII

Lodge Budget Worksheet

<i>INCOME/RECEIPTS</i>	<i>SOURCE</i>	<i>AMOUNT</i>	<i>TOTAL</i>
	Member Dues (+/- members from previous year)		
	LMIP		
	Degree Fees		
	Building Rental Fees		
	Investments		
	Fundraisers		
	Other (explain below)		
<i>TOTAL INCOME</i>			\$
<i>EXPENSES</i>	Grand Lodge Assessment		
	Utilities		
	Rent (if building not owned)		
	Temple/Lodge building maintenance		
	Building renovation/addition		
	Grounds maintenance		
	Insurance		
	Salaries and associated taxes (secretary, tiler, etc.)		
	Trestleboard printing and postage		
	Food or refreshments		
	Special/new activities		
	Secretary supplies		
	Meeting notices (classified advertising)		
	Charitable donations		
	Degree paraphernalia/candidate supplies		
	Lodge officer/member paraphernalia and aprons		
	Support of youth organizations		
	Flowers/gifts/get-well cards		
	Other (explain below)		
<i>TOTAL EXPENSES</i>			\$
<i>TOTAL INCOME - EXPENSES =</i>			\$

Lodge Name: _____

Budget Year: _____

APPENDIX IX

Committee Report Form

Committee Name: _____ *Date of Meeting:* _____

Chairman: _____

Members in Attendance:

Discussion:

Recommendations(s):

Submitted by: _____

APPENDIX X

Life Membership In Perpetuity Application

This section is to be completed by the Applicant:

Name _____
(FIRST) (MIDDLE) (LAST) GRAND LODGE MEMBER #

Street Address _____

City _____ State _____ Zip _____

Date of Birth ____/____/____ (M/D/Y) Social Security Number ____ - ____ - ____

Home Telephone ____ - ____ - ____ Work Telephone: ____ - ____ - ____

Lodge Name _____ Lodge Number _____

1. I HEREBY CERTIFY THAT I HAVE READ AND UNDERSTAND SECTION 5.0 OF THE VIRGINIA METHODICAL DIGEST. A PERSONAL COPY OF THE RULES PUBLISHED BY THE LIFE MEMBERSHIP IN PERPETUITY COMMITTEE (PLAN MANAGER) HAS BEEN PROVIDED TO ME FOR STUDY AND RETENTION.
2. I UNDERSTAND THE MANNER IN WHICH THE AMOUNTS CALCULATED BY THE LODGE SECRETARY FOR PLAN MEMBERSHIP WAS ARRIVED AT AND BELIEVE THEM TO BE CORRECT.

(SIGNATURE OF THE APPLICANT) (DATE)

This section is to be completed by the Lodge Secretary:

*Current Dues \$____.____ --- *Grand Lodge \$____.____ --- *Total \$____.____

- *1. THE FIGURES CITED ARE FEES IN EFFECT THE DATE OF THE APPLICATION.
2. THE MEMBER HAS ALREADY PAID THIS YEAR'S DUES. A CHECK IN THE AMOUNT OF 16 TIMES THE ANNUAL DUES OF THE LODGE AND THE GRAND LODGE IN COMBINATION PAYABLE TO THE GRAND LODGE OF VIRGINIA LIFE MEMBERSHIP FUND IS ENCLOSED.

(SIGNATURE OF THE LODGE SECRETARY) (DATE)

This section is to be completed by the LMIP Committee:

- [] RECEIPT IS ACKNOWLEDGED.
[] LIFE MEMBERSHIP IS APPROVED AS OF ____/____/____

(SECRETARY TO THE COMMITTEE) (DATE)

Please return to:
Grand Lodge of Virginia, Life Membership Committee, 4115 Nine Mile Road, Richmond, VA 23223-4926

APPENDIX XI

Masonic Brochures

- **Approaching a Prospect**
- **Church and Freemasonry**
- **For Your Information**
- **Freemasonry — A Way of Life**
- **Public Ceremonies of Freemasonry**

APPENDIX XII

Masonic Books for Prospective Members (and Master Masons as well!!!)

Symbolism/Ritual

Freemasonry: Symbols, Secrets, Significance by W. Kirk MacNulty
ISBN: 0500513023

A Dictionary of Freemasonry by Robert Macoy
ISBN: 0517692139

The Craft and Its Symbols by Allen Roberts
ISBN: 0880530588

General Interest/History

A Pilgrim's Path: Freemasonry and the Religious Right by John J. Robinson
ISBN: 087131732X

Born in Blood: The Lost Secrets of Freemasonry by John J. Robinson
ISBN: 0871316021

Is it True What They Say About Freemasonry? by Arturo de Hoyos & S. Brent
Morris
ISBN: 1590770307

*Revolutionary Brotherhood: Freemasonry and the Transformation of the American
Social Order, 1730-1840* by Steven C. Bullock
ISBN: 080784750X

Builders: A Story and Study of Freemasonry by Joseph Fort Newton
ISBN: 0880530456

American Freemasons: Three Centuries of Building Communities by Mark A.
Tabbert
ISBN: 0814782922

Mystic Tie by Allen E. Roberts
ISBN: 0880530863

House Undivided: The Story of Freemasonry & the Civil War by Allen E. Roberts
ISBN: 0880530561

The Freemasons: A History of the World's Most Powerful Secret Society by Jasper
Ridley
ISBN: 1559706546