

Strategic Planning Techniques for Grand Lodge

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Overview

- Benefits
- Prerequisites
- Up or Down
- Where to Start
- Developing the Plan
- Allocating the Resources
- Implementation
- Follow-up, Review, Re-validate, Reschedule

Benefits

- Continuity of Programs
- Unity of Effort
- Allocation of Resources
 - Money
 - Manpower
 - Time

ACE

- Accountability
- Commitment
- Enthusiasm

Up or Down?

- Choose the Approach
 - Bottom up or Top down
 - Personality dependent
- Top Down – more control
- Bottom Up – sense of ownership

Where to Start

- Resources
 - Previous plans
 - Seven Steps (Masonic Renewal Committee)
 - Membership
 - Other Jurisdictions
- Elected Officer Support
- Survey of the Membership

Vision

- Time frame
- Paint a picture
- Vs Mission

Vision Example

Freemasons of Washington will be recognized as relevant and respected Fraternity, committed to attracting and retaining all men of high quality, who strive for self-improvement and the opportunity to make a positive difference in their community.

Developing the Plan

- Selecting the participants
 - Current and future leaders
 - Willing to participate
 - Vested Interest
- Senior Leadership participation
 - Establishes credibility
 - Limited

Developing the Plan

- Initial meeting
 - Structured Approach
 - Set the scope
 - Determine the time frame
 - Working tools
 - Blank sheet
 - Envelope
 - Review survey results
 - Brainstorm

Select Areas of Emphasis

- Develop the Vision
- All ideas accepted
- Broad is good

Measurable

An Example From Washington

Pillars of Progress

- Grand Lodge Organization
- Education and Training
- Technology
- Family Involvement
- Community Involvement
- Public Relations
- Fraternalism
- Cooperation With Concordant/Appendant Organizations

Example Cont.

- Select Strategic Initiatives
 - Criteria
 - Applicability
 - Assign Milestones
 - Time Phase
 - Budget Considerations

Budgeting

- Money - Three Year
 - One Year Operating
 - Two Year Planning
- Manpower
 - Quantity
 - Quality
 - Expertise

Implementation

- Spread the Word
 - Annual Communication
 - Grand Lodge Publication
 - Grand Officer Personal Appearances
 - Focus Groups
 - Web Site
 - Other
- Lodge Involvement
 - Recognition
 - Lodge Plans

Plan Maintenance

- Review Continually
- Re-schedule as Necessary
- Update Periodically

Re-validate Periodically

Completed Initiatives

- Grand Lodge Organization
 - Modified Committee Structure
 - District Meeting Format Modification
 - Expanded Duties and Responsibilities Appointed Officers
 - Reorganized Grand Lodge Office
- Education and Training
 - Regional Training – All Members
 - Non-profit Board Training
 - Focus Groups – Long Range Planning, Secretary Training
 - Mentorship Training

Completed Initiatives

- Technology
 - Electronic Lectures
 - Grand Lodge Data Base
 - Electronic Forms and Reporting
 - Web Page Development
 - Hardware Installation
- Community Involvement
 - CHIPs
 - Bikes for Books
 - Recognition of Public Servants
 - Recognition of Outstanding Educators

Completed Initiatives

- Public Relations
 - Statewide Speakers Bureau
 - Media Relations Training
 - Consolidated Public Relations Plan
- Family Involvement
 - Ladies Training at Wardens Seminar
 - Open District Meetings
 - Ladies Program at Annual Communication

Completed Initiatives

- Fraternalism
 - Mentor Training
 - Hospitality Visit Program
 - Combined Monitor and Cipher
- Cooperation with Concordant Organizations
 - Organization of the Month
 - Joint Celebrations
 - Washington Masonic Alliance

Long Range Planning Team

Mid-Year Report to
EXCOM

Long Range Planning Team

Grand Master's Guidance

1. Educate the lodges on how they fit into the Grand Lodge Long Range Plan
2. Encourage and assist lodges in creating their Long Range Plan
3. Conduct mini-workshops on Long Range Planning in the Regional Workshops

Long Range Planning Team

- Masonic Appreciative Inquiry
 - Discovery
 - What do you love about your lodge?
 - Dream
 - Visualize what you would like the Lodge to look like in the future.
 - Design
 - Find the common themes in your memories and dreams
 - Plan how to make those dreams come true.
 - Destiny
 - Put your plan to work.

Long Range Planning Team

GMG #1

Educate the lodges on how they fit into the
Grand Lodge Long Range Plan

Long Range Planning Team

- Design: Common Themes (Examples)
 - Community Service Projects
 - Excellent Ritual Work
 - Family Activities
 - Relationships with other lodges
- Related Pillars of Progress
 - Community Involvement
 - Education and Training
 - Family Involvement
 - Fraternalism

Long Range Planning Team

GMG #2

Encourage and assist lodges in the creation
of a Long Range Plan

Long Range Planning Team

- Design: Plan how to make your dreams come true
- Destiny: Put your plan to work
 - Who
 - What
 - Where
 - When

Long Range Planning Team

GMG #3

Conduct mini-workshops on Long Range
Planning in the Regional Workshops

Long Range Planning Team

- Developed presentation for Regional Workshops
- Coordinating with Leadership Development Committee for opportunities to participate in Regional Workshops

Long Range Planning Team

Plan for the remainder of the current
Masonic year

- Regional Workshops
- Direct contact with lodges and LOMAs
- Indirect contact with lodges and LOMAs
- Articles for Masonic publications



Questions?



An Analogy

