PLANNING

W.Bro. Myles Makortoff

R.W.Bro. Murray Webster

Basic Worshipful Masters Plan

- Contact List for Officers and Key District Members
- Know all District Installations & Official Visits
- Quick Snapshot of your year
- Education Plan for your year
- Degree Plan for your year
- Prove-up Plan for your year
- Detailed Meeting Plan & Monthly Calendar
- If your stuck for Ideas use Existing GL Tools

KEY TALKING POINTS

- Introductions
- Worshipful Masters Plan
- Lodge Strategic Plan
- Grand Lodge Strategic Plan

[Five-Pillar Plan]

Closing & Questions

2009/2	010 Grand Lodge District Officers:							
District Deputy Grand Master (DDGM)								
District Education Office	er (DEO)							
Grand Secretary								
Lang	ey Lodge 184 2009/2010 Officers:							
Worshipful Master	Wor. Bro. Myles Makortoff E-mail: langleymaks@shaw.ca P:604-530-6177 C:604-992-434							
Immediate Past Master								
Sr. Warden								
Jr. Warden								
Treasurer								
Secretary								
Sr. Deacon								
Jr. Deacon								
Chaplin								
Director of Ceremonies								
Organist								
Sr. Steward								
Jr. Steward								
Director of Education								
Historian								
Inner Guard								
Tyler								



District 23	nstallations
September 24, 2009	Joppa No. 112
October 13, 2009	St. James No. 80
October 15, 2009	Langley No. 184
March 2, 2010	Cloverdale No. 168
April 28, 2010	Eureka No. 103
District 23 Official	Visits 2009 - 2010
September 15, 2009	Cloverdale No. 168 (R)
September 19, 2009	Dogwood No. 192 (E)
October 28, 2009	Eureka No. 103 (E)
November 19, 2009	Langley No. 184 (E)
November 26, 2009 (Grand Master Visit)	Joppa No. 112 (E)
December 10, 2009	Joppa No. 112 (R)
January 12, 2010	St. James No. 80 (R)
January 16, 2010	Dogwood No. 192 (R)
February 2, 2010	Cloverdale No. 168 (E)
March 10, 2010	Eureka No. 103 (R)
April 27, 2010	St. James No. 80 (E)
May 6, 2010	Langley No. 184 (R)
May 27, 2010	Joppa No. 112 (E)
SURPRISE VISITO In case an unknown brother comes to visit the lodge Law in the preparation room, with the Sr. Warden, D	

TYLER'S OATH
P.132 (Rulings & Edicts) Book of Constitutions, GL BC&Y

October 2009					N	ove	mbe	r 20	19		
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18 19 20 21 22	23	24		22	23	24	25	26	27	28	
25 26 27 28 29	30	31	29" Extra Emergent if needed	29	33	-	-				
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Year Do	egree Prove-up Plan – Quick Look
R - November 5, 2009:	MM – Bro. Dornan, EA – Bro. Klien, EA- Bro. Strachen Questions: MM – Bro Dowding, EA – W.Bro. Philipson
E - November 19, 2009:	
R - December 3, 2009:	
E - December 17, 2009:	
R - January 7, 2010	
E - January 21, 2010:	
R - February 4, 2010:	
E - February 18, 2010:	
R - March 4, 2010:	
E - March 18, 2010:	
R - March 31, 2010:	
E - April 15, 2010:	
E - April 29, 2010:	
R - May 6, 2010:	
E - May 20, 2010:	
R - June 3, 2010:	
R - September 2, 2010:	
E - September 16, 2010:	
E - September 30, 2010:	
R - October 7, 2010:	

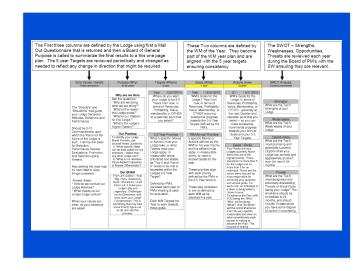
Year	r Regular Meeting Education Plan						
November 5th 2009:	Pushing the Limits in Dealing with the Hard Questions in Freemasonry, By: MW Bro. Jack Harper						
December 3rd 2009:	Canadian Cancer Society Mens Health cancer prevention, Speaker will be the Health Promotion Coordinator for the Fraser Valley. The Canadian Cancer Society Vice President will also attend.						
January 7th 2010:	BC Pine Beetle Problem brief overview, By: Bro. Todd Macey Blue Mountain Lodge						
February 4th 2010:	Ancient Builders of Rome, Greece, & Istanbul, By: Rt Wor. Bro. Ian Bowman						
March 4th, 2010:	The danger of Dan Brown's "The Lost Symbol", By VW Bro Trevor McKeown						
March 31st, 2010:	Port Mann / Highway 1 Improvement (PMH1) Project Presentation, Speaker will be from the Crown Corporation in charge of project.						
May 6th, 2010:	DGM 2" Visit ☐ Talk by Director of Masonic Education or ☐ Speaker on Wills & Estates ☐ Other TBD ☐ Other TBD ☐ Dr. Don MoLeod from Merritt for Mens Health Talk						
June 3rd, 2010:	Elections Night Talk by Director of Masonic Education or Myles Makortoff " Pythagoras Numerology & its Use Today "						
September 2nd, 2010:	□ Talk by Director of Masonic Education □ Speaker on Wills & Estates □ Other TBD □ Dr. Don McLeod from Merritt for Mens Health Talk						
October 7th, 2010:	□ Talk by Director of Masonic Education □ Speaker on Wills & Estates □ Other TBD □ Dr. Don McLeod from Merritt for Mens Health Talk						

Sun	Mon	Tue	Wed	Thu		Fri	Sat	
				LL184 Regular Communica	1 ston	2		
4	5	Governate 163	7	Joppa 112	8	9	1	
11	12	5t. James 80 Installation	Eureka 103	LL 184 Installation Myles Maks	15	16	Dog~00d 192	
18	19	20 Cloverdale 163	21	Joppa 112	22	23	2	
25 Send info for December Trestleboard	26	St. James 80 27	Eureka 103 DDGM Vist		29	30	3	
Invited Education	on Speaker:			Topic:				
☐ 5min Talk on	a Past Master:	☐ 5min T	alk on a New Mas	ter Mason:	D 1	0-20min Lodge Ed	lucation Officer	
By:	of	By:	of		Talk	on:		
		Regular	Communicatio	n Agenda:				
2) Reading & 3) Unfinished	Correspondence	ztes ☐ 7) Pres ☐ 8) Ballo ☐ 9) New	ing of Bills & Acc entation of Petitio sing for Candidat Business ice of Motion	ns	8	Conferring of D Education Enquiring of Sic Good & Welfare	k & Distressed	
Emerge	nt Communicat	ion:	Degree o	· □	No C	andidate See Ed	ducation	
Question 1:	red Apprentice	Secrets:	Fellow Craft			Master f ospect 1: ospect 2:		
Question 3:		S.E. Angle				es:		
						ing:		
			and: Sr. Warden			Mortality:		
Apron Charge: N.E. Angle:		- Final Char	9*		Secr	ets: in Charge:		
Working Tools:		-				ition History:		
Charter:		_			Trac	ing Board		
Tracing Board: Jr	r. Warden	_				king Tools:		
Final Charge:					Fina	Charge:		
						replification:		
					Bible	Charge:		
Invited Education				Topic:	_			
☐ 5min Talk on			alk on a New Mas			0-20min Lodge Ed	lucation Officer	
Bv.					Talk on:			

Yea	ar Emergent Meeting Degree Plan								
October 29, 2009:	NO MEETING								
November 19, 2009:	DDGM 1 st Visit FC Degree: Bro Stephen Klien, and Bro James Strachen (Double)								
December 17, 2009:	EA Degree: Mr. Mark Levesque								
January 21, 2010:	EA Degree: Mr. Ian Schelehofer, Caledonia Night & Taste of Burns (Scottish Degree Team will perform the degree)								
February 18, 2010:	1) FC Degree: Bro. Purdy 2) MM Degree: Bro. Klien 3) MM Oegree: Bro. Klien 3) MM Oegree: Bro Strachen								
March 18, 2010:	1) FC Degree: Bro. Purdy or 2) MM Degree: Bro. Klien or 3) MM Degree: Bro Strachen								
April 15, 2010:	1) FC Degree: Bro. Purdy or 2) MM Degree: Bro. Klien or 3) MM Degree: Bro Strachen								
April 29, 2010:	1) FC Degree: Mr. Mark Levesque (Extra Emergent) And Jor (May Require a Double FC) 2) FC Degree: Mr. lan Schelehofer (Extra Emergent) or or 3) MM Degree: Bro. Purdy (Extra Emergent)								
May 20, 2010:	EA Degree: (Candidate TBD) Step-up Night, Bro. Darcy Dowding								
September 16, 2010:	1) FC Degree: Mr. Mark Levesque And Jor (May Require a Double FC) 2) FC Degree: Mr. Ian Schelehofer (Extra Emergent) or 3) MM Degree: Bro. Purdy								
September 30, 2010:	MM Degree: Mr. Mark Levesque (Extra Emergent)								

	Comment Made	for the Month	
Busine		n with Sr. Officers prior to	meeting
☐ Secretary - ☐ By Phor		☐ Jr. Warden - ☐ By Pho	
☐ Sr. Warden - ☐ By Ph		Director of Ceremonies -	_ ,
☐ Education Officer - ☐		C Discour or Calamaties -	C by r noise C by Crissi
		on with the Secretary	
General Notice content	nome for community	Final Approval of the No	tine
Confirmation of Content	Sent to Trestle Board	□ Other	
Discussions with the DDG			
Discussions with the DEO			
Unfinished Lodge Busines	s that needs to be address	ed:	
Current Committees:			
Current Petitions:			
Upcoming Ballots:			
New Business or Motions	to be discussed:		
Emeror	ent Monting - Communicatio	n with All Officers prior to	monting
☐ Secretary - ☐ By Phor		☐ Jr. Warden - ☐ By Pho	
☐ Sr. Warden - ☐ By Ph		Director of Ceremonies	_ /
Sr. Decon - By Pho		☐ Jr. Decon - ☐ By Phor	
☐ Sr. Steward - ☐ By Pt		☐ Jr. Steward - ☐ By Phy	
☐ Inner Guard - ☐ By Pi		Chapline - By Phone	
La lillier Guard - La by Fi		Next Degree or Prove Up	e LI by Critical
Candidate	EA	FC	MM - Prove Up
Candidate	LA.		mm - rrove up

	Grand Lodge of BC & Yukon Lodge A	wards Program
2ota Ite	em Description of Task - Category A: (2 points each)	Notes
_ A	Notwithstanding visitation incentives of Districts, at least four (4) Lodge members, including at least two (2) elected officers, must visit a tyled meeting of enother Lodge having travelled a reasonable distance to do so.	
	Attendance by at least four (4) members, including three (3) appointed officers, at the same filed meeting (excluding joint communications) of another Lodge. [If item A1 and A2 are completed simultaneously — receive 4 points.]	
	At least five (5) Lodge members, including at least two (2) delected officers are to participate in a District / Regional Masonic Leadership Course	
	The Lodge must hold a ritual practice in at least two (2) of the three (3) degrees of Masonry with a minimum of six (6) officers in attendance at each practice	
	Other than Lodge notices (which must contain mandatory information as per the Book of Constitutions), the Lodge must distribute at least three (3) written communications to its entire membership reporting on Lodge activities. Masonic education or articles of Masonic inferest, and future Lodge activities in the Lodge's calendar year.	
	The Lodge's voting delegates (as per Book of Constitution) must participate in the current year GRAND LODGE COMMUNICATION	
	Reports and payments of Grand Lodge per capital 47 assessments with are to be completed and filed with the Grand Secretary by the dates required by Grand Lodge	
□ A	48 Conduct a "Bring a Friend to Lodge Night" or "Buddy Night"	
	File a Lodge Budget for the year and present it to the Lodge for its approval	
□ A	10 Have a phoning committee for your Lodge to contact all local members.	
	The Master to present a formal plan for the lodge's work and activities for his term of office to the membership	
□ A	A Brother from the lodge to attend another lodge and present a Masonic paper or other program of Masonic interest	
□ A	13 Conduct a visible public Masonic event, such as sponsorship of or participation in local youth activities	
	Conduct three (3) Masonic Education programs during the year. At the Worshipful Master's discretion, these programs may be part of either a Regular or Emergent Communication	
□ A	At least two (2) Lodge members, including at least one (1) elected officer, visit a Job's Daughters or De Molay meeting, especially on a Fraternal Night of the youth groups	
□ A	Visit a local Elementary School and present details of the We Can Help Program to the administration and/or teachers	
□ A	Have one or more Entered Apprentices or a Fellow Craft present a paper to the lodge about their thoughts on the degrees through which they have traveled; the paper to be presented before the brother progresses to the next degree	
□ A	Hold an Appreciation or Recognition event for prominent persons (Masons or non Masons) in such fields as government, medicine, science, education, religion, youth work, etc.	



-pt	Item	Description of Task - Category B: (1 point each)	Notes
	B1	invite and host a meeting for at least one other Lodge (i. e. a. fraternal visit)	
1	B2	Hold a special event to which the Lodge members' ladies and deceased members' ladies are invited. Such events could include Ladies' Night, Dinners, Picnics, Ice Cream Socials, Dances, etc.	
]	В3	Hold a meeting in which Job's Daughters and/or DeMolays present a program about their ritual, work, or activities.	
)	B4	Recognize Masons, such as Past Masters, fifty (50) year recipients, a Mason of the Year, a Dennis Marsh Medallion recipients, or others where lengthy or special service to the Lodge is acknowledged.	
_	B5	Visit a local high school or invite a high school student to a Lodge meeting with their family who has been awarded a Bursary Grant from our Grand Lodge (or a lodge bursary) and present the bursary.	
_	B6	Recognize one or more outstanding students from local public schools at a special program open to the public, and present a plaque and certificate.	
_	В7	Perform as a group from your Lodge, a public service or charitable activity (such as Red Cross Blood dionations, collection of food items for a Food Bank, clothes for the needy, hospital service, assist Salvation Army with Ringing Bells for Christmas, perticipate in a Cleanup Program such as highways, parks, allevs etc.).	
_	В8	Have at least 10 members of a Lodge participate in a local parade by marching or riding on a float to show the public who and what we are.	
7	B9	Organize an activity for masons and their families.	
)	B10	At least four (4) members of the lodge, and families if they desire, attend a church parade or church service.	
)	B11	Conduct a "Rusty Nail Night" - an evening where members who have not attended Lodge for some time can refresh their memory of the signs, tokens and words.	
	B12	Make contact with and assist Masonic widows during the Masonic Year offering assistance where needed	
0	B13	Visit all members of your lodge who are within the length of your cable-tow, who are unable to attend lodge because of infirmaries and other health issues, and spend time in fellowship with them.	
_	B14	Honour new Lodge members who have been raised to the sublime Degree of a Master Mason within the last three (3) years	
	B15	The Lodge to exemplify any of the three degrees (one point for each degree) at least once during the qualifying year should they have no candidates for the three degrees	
	B16	invite the District Education Officer to your lodge to make an educational presentation to the Lodge.	

Core Values / Beliefs	Purpose (Why)	Targets (Where)	Goals (What)	Actions (How)	SWOT Analysis
These are forever	10-30 years	5 year	1 year	Quarter	Current Environment
The "Should s' and "Shouldn's that guide your Lodge Decisions, Albudes, Behaviors and Parformance. Should be 5-10 Commandments upon which the Vision for the future of the Lodge is built. It will be the basis for Selection. Performance Review Performance Review Committed to the Lodge is built. It will be the basis for Selection.	Why are we Here Ask the questions: 'Why are we doing what we are doing?' 'What is the reason this Lodge exists?' 'What is our Passion for this Lodge'? 'What's the Lodge's Higher Reason?' Our Promise To identify your Lodge yourself these Questions: 1) 'What specific Need on we best safety for our members - Better than your Lodge of the Committee of the Committ	Veer 12/31/2015 Where do you want your Lodge to be 3-5 Years from now, in terms of Revenues, Profitability, Value, membership or CTHER at a cleving point that you select? 3-5 Year Priorities What 5 specific Moves or Actions must your Lodge lake, or what Talents must your Lodge apply, in Lodge apply in Lodge apply in Special Communication of the communication of t	Veer 12/31/2010 VMIs Goods for the Lodge 1 Year from now, in terms of Revenues, Profitability, Value, Membership, or O'HER ensuring towards the 3-5 Year Targets defined by the PMI Annual Pronties 5 specific Moves or Actions defined by the VMI for his year that has and his officers must apply; in measurable serviced Goods for the vertical Confidence or the specific Moves or Actions defined by the VMI for his year that has and his officers must apply; in measurable serviced Goods for the	C-1 4/31/2010 WMI's Goals for the Lodge, in terms of Revenuse, Profitability, Value, Membership, or O'HER's eperately at the next Guarter-end or select – Bo you can neste substantial, incremental progress towards your Annual Goals and your 3-5 Year Targets. Goals / Rocks Your Rocks are your littens that are of the highest priority. There	Strengths What are the Top 5 Strengths of your Lodge Weaknesses What are the Top 5 Weaknesses of your Lodge Opportunities With are the Top 5 most promising and potentially fucrative Opportunities your Lodge can actively an
Also defines the road map for each VMM to keep things consistent. Answer these: 1-love do we conduct our Lodge Activities? Vivinet makes up our unique Lodge utiture? When your values are cleer, all your decisions are easier.	Value-Added Proposition of Market Differentiator? Our BHAG From Jim Collins: Your 'Big, Harry, Audaclosis Cool.' Should be 10.25 Yessis out, if make your Legience of the Collins of th	as "Top 5 and First of 5' Goals to be met or exceeded within the Lodges 3-5' Year Target? Series 1' Target? Period 1' Target? Period 1' Target 1' Target? PM's meeting & used for evaluation. Bach WM Targets Ns. Year to work towards these goals.	year. These priorities align with each priority defined by the PM's in the 3-5 'ver Actions. These stay consistent or are re-defined by each WM as he develops his year.	should be no more than 65 or the Lodge and no for the Lodge and no formed to the Lodge and no individual. Rocks are the action ferms that will be most responsible for most responsible for an individual not consider the lodge and annual applies. For each nock, an individual or office it home. To advance the Plan, with 700 beam for Whot? To advance the Plan, with 700 beam for Whot? Viviat? And 15 by When' with the commitments be me? Be very specific, what commitments each person is making to make the person is making to make the person is making to make the most be the middle.	over the next 3-24 months Threats What are the Top 5 most dangerous and potentially devastating Threats or Brutal Fact facing your Lodge? Thimeframe should be immediate to 24 months, and should include Threats which you have some degree of control in countering

Simple Lodge Strategic Plan

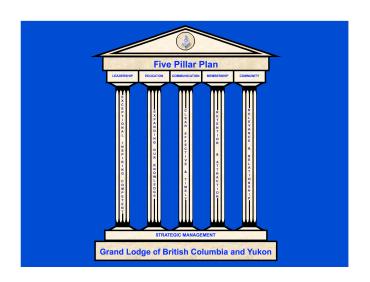
- Brief Overview of One Page Strategic Plan
- Key Components of the One Page Plan
 - 1) Core Values
- 4) Actions
- 2) Purpose
- 5) SWAT
- 3) Targets
- Quick Example of Components
 - 1)Keep it Simple & Measureable
 - 2)Whole Lodge has to contribute & Own it

Core Values / Beliefs These are forever	Purpose (Why) 10-30 years	Targets (Where)			Goals (What)			Actions (How) Quarter			SWOT Analysis Current Environment	
Always Have Fun Always Perform Excellent Ritual	Why are we Here Different, Fun, Memorable, a Welcoming Place to Go To	Year Receivables Payables Surplus Members Attendance	12/31/2015 \$ \$25,000 \$23,000 \$10,000 80 35	Pa St Me	Year aceivables ayables urplus embers tendance	12/31/2010 \$18,000 \$16,000 \$2,000 64 20	S	Q-1 teceivables ayables surplus tembers ttendance	\$18,000 \$5,500 \$2,000 62 20	1 2 3 4 5	PM's support future officers	
Aways Pati Our Visitors 1st 3: Never Let Them Sit Alone Let Them Sit Alone Empower Current Sit Alone Empower Current Sit Alone Aways Take A Quality and Vetecoming Social 12 Hour Meetings Are Enjoyable, Meeningst Let New Let The Meetings Are Social Events Are Alone Social Events Are Alone Social Events Are Alone Alone Sit Alo	Our Promise We Take Care of Our Members and their Families And You Will Always Enjoy Coming to a Langley Lodge Meeting, Degree or Social Exert Our BHAG Example: To have 60 members attend all lodge meetings	Involve i Touch w Existing Member Mentors Officers Represe Leaders Mentors Interesting A consis Defined 4 select e before a investig Regular Events f	Lodge ship hip for Lodge Who int Future hip hip for Newly Lodge s stent & Process to very initiate in ation Social or the	1 2 3 4 5	A) Create from the letter to s B) Phonin committe and accood Generate Strategic future off Review Gmentorsh and imple all. Documer process f M. and in Two majo	e action plan untability + a 1 page plan for icers SLBC&Y tip program ement part or it 6 step from George inplement or Social er year and	3 3 1 1 1 1	Send out from the 8 newslette WM Q-1 Gc Complete plan by M PM's inpu WM Q-1 Gc Get rough Six step p	a monthly East c. and / Rock tog stret farch w/ tt and / Rock tog stret farch w/ tr and / Rock tog stret farch w/ tr and / Rock tog stret farch w/ f	1 2 3 4 5 5 1 2 3 4 5 5	Staying in Touch of our Members No Long Term Plan Opportunities Langley Web Page Visiting & Visitors Olympic International Traveling Gavel	

Grand Lodge of BCY "Strategic Plan" FIVE PILLAR PLAN

For example, let's look at the pillar of

LEADERSHIP



LEADERSHIP

 Goal: Develop and maintain exceptional and inspiring leaders who are competent, creative, dynamic and committed

FIVE PILLAR PLAN

- LEADERSHIP strong, effective, committed
- EDUCATION Freemasonry, Society, Liberal Arts and Sciences
- COMMUNICATION clear, effective, timely
- MEMBERSHIP retention and attraction
- COMMUNITY relevance, relationship

LEADERSHIP – Key Objectives

- LE1. Present the "Lodge Officers and Ladies (Masonic Leadership)
 Conferences" every two years.
- LE2. Hold an annual two-day seminar for incoming DDGM's

LEADERSHIP - Key Objectives

- LE3. Update and maintain the "Lodge Officer's Leadership Development Workshop". Continue to conduct at least one workshop annually in each region in alternative years.
- LE4. Develop a definition of the desirable characteristics / skill-set required for a leader in Freemasonry.

Strategic Plans for Lodges can be developed in the same manner

LEADERSHIP - Key Objectives

 LE5. Provide mentorship for Candidates and Lodge Officers through expanded use of the Mentorship Program Focus on the Five Pillars
Establish Goals to be achieved
Determine Tasks to attain those goals
Set Timelines
Establish Accountabilities
Monitor status regularly

LEADERSHIP Timelines and Accountabilities

- **Timelines** are assigned for each Key Objective.
- Persons, Positions or Committees are accountable for each Key Objective.

www.freemasonry.bcy.ca

Member Services Lodge Member Resources USER NAME: <u>masonic</u>

PASSWORD: Member
Five Pillar Plan v_ (date) [PDF]

