



Strategic Planning for Lodges

For presentation at the Annual Communication, March 18, 2011

This is the design for the 20-minute talk about Strategic Planning for Lodges at the 2011 Annual Communication in Salina, Kansas. This presentation is being delivered by Rick Reichert with assistance from Robert Nelson. The presentation was conceived, supported and edited by the Leadership Resource Team of the Grand Lodge. Supporting materials are available on the Grand Lodge web site.

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Strategic Planning for Lodges

“And behold, I intend to build a house for the name of the Lord my God.”

King Solomon to King Hiram of Tyre, 1 Kings 5:5

At the building of King Solomon’s Temple there was one Grand Master of all the work – Hiram Abif. Each day, he would enter into the sanctum sanctorum, there to offer up his adoration to deity and then draw his designs upon the trestle board. These designs were intricate plans – the blueprint that would communicate to the masters, or overseers of the work, what was to be done and where their accomplishments would contribute to the whole.

Solomon had the vision. The vision was the erection of the most magnificent temple ever known to man: A temple that was an honor to the Grand Architect of the Universe and become the religious center for all the Hebrew peoples and their fellow believers. Hiram Abif had the plan to turn Israel’s dust into a magnificent edifice thereby achieving the overall vision. This model is also a perfect foundation to talk about the principles of strategic planning and why it is essential for even the smallest lodge to have a plan.

This session is to help motivate you to engage in strategic planning for your lodge and fulfill the first objective of the Leadership portion of Vision 2020: "By the time of the Annual Communication in 2013, each lodge will have a sound strategic plan to guide them toward long-term growth, sound financial footing, capital improvement, fresh faces in positions of leadership, and solid reputation in their communities."

Why Strategic Planning

“Most people don’t plan to fail. They simply fail to plan.”

Unknown

Everyone plans. The problem is that the usual amount of time between the plan and the event is much too short. Most of my observations of Kansas Masonry are that we too often engage in reactive planning. Something happens. It requires immediate attention. One or more people get together to figure out what to do. They do it. Mission accomplished.

Here’s an example: A water pipe breaks in the kitchen of the lodge. You know that the plumbing needed work for some time but the building was old long before you got there and no one seemed to take ownership to plan an upgrade. But finally, the old pipe gave way. There is a lot of damage to the floor and the ceiling of the room below. A couple of stalwart brothers get together and decide what to do. Besides the obvious reaction of shutting off the water, the plan goes something like this: Get some buckets and mops and dry the place out as best as possible. Remove damaged piping, flooring and ceiling. Figure out what parts are needed to patch things up. Get a verbal to spend lodge money on the parts. Scrounge for what the treasury can’t afford. Form a work party. Patch things up as best as you can.

The problem with that scenario is that it was reactive to an event that required immediate attention. It did not further the cause of the lodge and may, in fact, have put the lodge at risk due to unanticipated spending, weakened floor, and an unsightly patchwork.

If you’re always doing seat-of-the-pants planning pretty soon you’ll wear out the seat of the pants and guess what ends up showing?

Strategic planning, on the other hand, looks farther out into the future. It anticipates the shorter term problems and works around obstacles in order to achieve a much longer-term vision. It involves more people and creates excitement. It takes a large, sometimes complex, seemingly impossible vision and breaks it down into manageable chunks. It is the roadmap to a destination you pick. And it keeps you in the right direction for the long haul. What specifically is a strategic plan?

What is a Strategic Plan

“Where there is no vision the people will perish.”

Proverbs 29:18

Certainly, in the hundreds if not thousands of hours you’ve sat in your lodge you’ve looked around and wondered what the lodge could be only if ... If you’ve done that, you’ve had a vision. There’s a term in business called Hoshin kanri. **Hoshin kanri** is a method devised to capture and cement strategic goals as well as flashes of insight about the future and develop the means to bring these into reality. It is akin to seeing a shiny metallic object off in the distance. The vision. You fixate on that object and visualize how you will get there. In between may be rivers, mountains, dangers of many kinds, but as long as you keep the object in view, you guide toward it until you reach the object, or as you near the object you discover that there is another, more valuable shiny object further along.

The plan is how you intend to get across the abyss from here to there. The abyss may be multiple years, even beyond your terms as an elected officer.

Here’s an example of planning that is not strategic. A brother working his way through the chairs anticipates his year in the East. He diligently plans activities, sets aside resources, lines up his appointments, and determines his theme for the year. Chances are he has not shared the plan with many. He has certainly not shared with the predecessors lest they steal his great ideas or his successors lest he leave unfinished business for someone else. During the execution of his year, the plan gets partially executed but as the year winds on, the plan is overcome by distractions, unanticipated problems, and a seeming apathy because brothers are not rallying to get things accomplished. Throw in sticky year-to-year problems that won’t go away, a dwindling membership, a treasury that has all but dried up due to inflation, a bunch of old but faithful brothers who believe in unalterable tradition, a decaying lodge building, and a community who has no idea you exist and you wonder how anything gets done at all. Where the plan failed is that it was not toward a shared vision – a longer term, shared aspiration that makes the Master’s year a building block in achieving a vision.

And now an example of planning that is strategic. A group of brothers, including the Senior and Junior Warden, want to accommodate several older, less mobile brothers who do excellent degree work but need assistance getting up the steps to the lodge room. Dues barely meet expenses and there are no reserve funds. They sit down with all the lodge officers and many interested brothers to create a strategic plan. After weighing all the options, an elevator, although more expensive than a chair lift, provides greater utility and a better long-term return for investment. They plan a series of fundraisers and write for a grant under the Health and Disabilities Act. The lodge votes a modest but needed dues increase. For two years the lodge focuses on their strategic aim, telling everyone that will listen. They get unexpected support from local businesses that heard about the lodge’s plan and allowed the lodge

to conduct “sidewalk days” which increased foot traffic for the stores and put the lodge over the top. Because everyone knew the lodge’s plan they stayed on track and twenty-six months from the first planning session, construction was started on the elevator and the planning began in earnest to replace the old roof before it leaks.

A strategic plan starts with a long-term vision of an ideal situation for your circumstances that cannot normally be achieved in a single lodge year. Examples are a new lodge building, a refurbished kitchen and dining room that can be rented out as a revenue enhancer, completing a community project meeting the criteria described in the Relighting the Torch, or reducing the median age of your membership by 20 years. Your vision may be as widely varied from lodge to lodge as the distance is from Highland to Hugoton. The steps that you plan to take to get from here to your vision are the strategic plan.

What is in a Strategic Plan

“If you don’t know where you’re going, any road will get you there.”

Unknown

A plan is a series of logical steps that get you from point A, the present, to point B, the accomplishment of your vision. There is no secret formula for a plan. There is not a universal template. A plan is not one-size-fits-all. You will not be graded or tested on a plan. And, as anyone with military experience will tell you, no plan ever survives past first contact with the enemy. There is no doubt, however, that in order to succeed you must have a plan.

A simple example is a road trip. If you want to get from Kansas City to Johnson City and have never made that trip before, you can’t just jump in the car and start rolling forward and expect to arrive at your destination without first planning. Think about all that you need to consider before making that trip. You have to have a vehicle. It must be insured and maintained. You’ll need fuel for the trip. Will you need to stop overnight somewhere? Where will the funds for all this come from? How about a road map or GPS? Are there any tolls along the way? How about construction or bad weather? What will you do when you get there? Do you need a change of clothes and toiletries? Do you want to make any stops or visits along the way? Who needs to be notified of your departure and take care of business back home. Is anyone going with you? Will you need gifts or a ready speech upon arrival? How long will you be there? And, very importantly, what contingencies will you make should an unexpected detour, delay or setback cross your path? This may be second nature to a seasoned traveler but for someone going to Johnson City the first time, there’s a lot to think about before you head down the highway.

Strategic planning to reach a new destination for your lodge is no different. Once you know where you’re going, you will need to think through the details. The strategic plan is a way to capture enough details that both you and others can see what needs to be done and in what order they need to be accomplished. It breaks the journey down into small enough pieces that each step becomes manageable. It allows you to communicate what you want to do in such a way that it seems achievable. It begins to allow others who are not normally engaged to find a niche, take ownership of portions of the plan and start to make things happen. The plan allows you to pencil estimates of when things can get accomplished. And the best part is that stealing of your ideas is desirable if achieving the vision is really what you have at heart. A plan can be a list, a schedule, a diagram, a spreadsheet, a project plan, a narrative, an outline, a blueprint, an architect’s sketch, or a combination of any, all or none of these. But it must be something tangible, available, flexible, and in enough detail that it can be understood and turned into action.

How do you plan

“A body at rest tends to stay at rest. A body in motion tends to stay in motion.”

Newton's Law

Newton's Law says that a body will change its velocity, accelerate or decelerate, **only** when an external force is applied. No force, no change. A plan is an excellent tool to allow you to initiate the inertia to get things rolling. Your experience tells you that once things get going, it's much easier to keep things going. If no one takes the initiative to get things started, nothing will happen. You know how the story goes. Four people are named Everybody, Somebody, Anybody, and Nobody. There was an important job to be done and Everybody was sure that Somebody would do it. Anybody could have done it, but Nobody did it. Somebody got angry about that because it was Everybody's job. Everybody thought that Anybody could do it, but Nobody realized that Everybody wouldn't do it. It ended up that Everybody blamed Somebody when Nobody did what Anybody could have done. That leaves you to do it. You must dive in to make the difference.

Certainly you can take your first swimming lesson by being dropped in the middle of the ocean. And you can begin planning by being dropped in the middle of a big problem to solve without any expertise, help or support. But that is not only scarier than the long swim, but also has even less chance for a successful outcome.

If you've never done a strategic plan before then you need to begin your first swimming lesson in a shallow pond with a good instructor. Check within your lodge, your work, or community for someone who has led a large initiative and solicit their advice and mentorship. If you can't find someone locally, work with your DDGM or ADGM. The Leadership Resource Team is also putting together templates and materials for the Grand Lodge web site. And, there are myriad books and web sites on the topic of strategic planning. Certainly, don't swim alone if you don't have to.

Whatever resource or tools you use to get started, at least get started. You must be the inertia. And it's a matter of starting the process, keeping at it, not being discouraged, understanding that this is a hard thing to do until you start to do it. Once things get going, it gets easier. This is a stuck nut that won't budge off a rusty bolt. Even with the best lubricant, it takes a lot of force to get the nut turning. Once it gets going, life gets easier. So it is with strategic planning. It takes a lot to get things in motion, but once you get it turning, then it's a matter of seeing the process through until you've achieved your vision. So, where do you begin?

The planning steps

“It’s always best to start at the beginning. All you do is follow the yellow brick road”

Glinda, The Good Witch of the North

We have good advice from Glinda. It’s always preferable to start at the beginning. Then work your way methodically through whatever process you choose. There are many ways to plan but best practices used in industry, non-profit, and even government organizations have a common set of features that yield plans that are the most apt to guide them to their Emerald City. I’ll go through the steps quickly so you know they are simple steps but I refer you to our Leadership Resources area of the Grand Lodge web site for the details and how to get help if you get stuck.

- Have a clearly articulated vision.
 - Share it with everyone.
 - Get their agreement that it’s a worthwhile vision (without regard to how realistic it is.)
- Look at **SWOT** so you know your environment and analyze for gaps between where you are and where you want to be.
 - **S**trengths
 - **W**eaknesses
 - **O**pportunities
 - **T**hreats
- Set **SMART** objectives, those manageable chunks.
 - **S**pecific
 - **M**easurable
 - **A**ttainable
 - **R**ealistic
 - **T**ime Bound
- Tell everyone
 - Interested or not
 - Repeatedly – Don’t let it drop. Expect “No” as the first, second, and third answer.
 - With conviction – If you believe – others will too.
 - Build enthusiasm and celebrate success along the way.
- Rally the resources
 - Let others be part of the project.
 - Once you get folks wound up, let go and let them carry the ball.
 - Raise funds – Anything worthwhile will get support.

Samples of Strategic Planning

“Git –R-Done!”

Larry the Cable Guy

In 1985 Rotary International set forth toward their vision to eradicate polio from the earth. This vision was on the same scale as the vision of curing cancer is today. The plan was to engage the vast network of 1.2 million members to raise money, volunteer time, and provide the networking expertise necessary to immunize the world. Over the years they’ve garnered the support of the World Health Assembly and nearly all governments. They even scored large contributions from the Bill & Melinda Gates Foundation. Their immunization campaigns have extended throughout all the developed nations to the point that most adults under the age of 50 have never met a person who has been inflicted by the disease. The impossible vision is now almost reality where immunizations are now being delivered in only a very few remaining developing countries, where polio continues to infect and paralyze children. I have no doubt that within 30 years from its inception the Rotarian vision will have been accomplished.

Here’s another example of a strategic plan in motion closer to home. If you know Most Worshipful Jeffrey L. Sowder (1997) you know about the very lofty vision the Kansas Masonic Foundation has for the Kansas Masonic Cancer Research Institute. The vision is to eliminate the unnecessary human suffering inflicted by cancer. To reach that vision, KMF has set very difficult, stretch objectives. Over the years the objectives went from a sponsored chair to a \$15 million campaign, the Patient Navigator, and more recently, National Cancer Institute designation. Each objective was seemingly unachievable at the time it was announced. Yet, through use of these careful planning steps, each objective was achieved earlier than promised. Doctors, politicians, Masons from across Kansas, and friends from all walks of life are involved in seeing the vision become reality.

If something seemingly impossible as eradication of polio or the curing of cancers can be achieved, certainly a group of moral men with great intentions can set a vision for the future success of their lodge, and then draw a plan that will get them there.

Conclusion

“Leaders are made, they are not born. They are made by hard effort, which is the price which all of us must pay to achieve any goal that is worthwhile.”

Vince Lombardi

I hope you will take away at least three important points from this presentation. First, that every lodge must have a strategic plan. Whether it is an aggressive plan for growth or modernization, a simple plan for improving the lodge or community, or a plan for the graceful sun-setting of lodge with no viable long-term prospects, each lodge should have a written plan. Second, that it will take some inertia to boldly go where no one has gone before. Planning and leading the planning is daunting for the uninitiated but the best way to get something done is to start doing it. And third, there are a lot of resources available, willing and able to help you get going. All of Masonry succeeds when the blue lodge succeeds. That’s why Grand Lodge has a strategic plan. It helps focus us on what’s important and leadership is one of the four most important parts of Vision 2020. Planning is a basic of leadership.

Thanks for attending. In the remaining time I’ll take questions and with the help of the Leadership Resource Team members here we’ll attempt to answer them here or get back with you.

With the Leadership Resource Team

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