



**Purpose**

This narrative is intended to be used to facilitate “Strategic Planning Bootstrap for Lodges” sessions. Author is Rick Reichert, Deputy Grand Master 2012-2013.

This session is to fulfill the first objective of Vision 2020, Grand Lodge’s strategic plan that states, “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.”

By the end of this session, participants should have plenty of ideas and a rough framework for a plan for their lodge. This is meant to jump-start planning for lodge leaders who have had difficulty initiating the planning process. The intent is that these leaders will take what they’ve accomplished back to their lodge, assemble their current and potential leadership, and then chart their future.

**Prerequisites**

Read materials on Vision 2020 page of the Grand Lodge web site. The direct link is: [http://www.kansasmason.org/?page\\_id=1091](http://www.kansasmason.org/?page_id=1091)

Read the rest of this facilitation guide and the Sample Plans document in order to be better prepared to take full advantage of session and ask questions

**Outline**

Agenda Item	Lecture	Formulate Responses	Share Responses
Introduction (Time is in minutes.)	10		
<b>FOCUS: Mission and Vision Statements</b>	10	10	10
FOLLOWING WINDS and POTENTIAL FISSURES: <b>SWOT</b>	15	15	15
FINDING THE WAY: <b>Goal Setting</b>	10	10	10
FITTING THE PIECES IN PLACE: <b>Development of intermediate objectives</b>	15	15	15
FINISHING WELL: <b>Communicate, assign, execute, and celebrate success</b>	5		
Wrap Up	5		



Total time is 3 hours (170 minutes with 10 minute break at presenter's discretion.

Participants need to know that they won't have a full plan when the session is over. They should have a lot of notes, tons of great ideas, and a good understanding of the process so the plan can be completed back at their home lodge.

### Introduction

We are so busy with day-to-day operations of our lodge and the year-to-year elected terms that we rarely sit back and think long term. Long term for a lodge is 5-7 years out. [Accomplished by the time the JD or JS completes WM year]

We will not develop a strategic plan for your lodge in 45-50 minutes. But, by the time you leave here, you should have a lot of notes and a boiling pot of ideas in your mind. It's hard to start planning from scratch – So, this is a working session to give you a running start. This is a framework you can take back and put the rest of the structure together.

The format follows the materials linked on the web site. We will follow industry standard, best practices of strategic planning applicable to not-for-profit and volunteer organizations. It will, however, be in a much abbreviated form.

The hardest part about planning is getting started. But I believe that you have already done some of the planning but didn't realize you were thinking strategically. This session will help you begin to capture those thoughts in a manner you can use.

We will go through the phases of planning in a very accelerated pace. I will be asking you a series of questions designed to help you understand what each phase of the plan is looking for. If this sparks a thought, jot enough down that you can pick back up on it later. But don't dwell on any one part because we're going to go on so we can end on time.

Once you get the hang of the planning flow, there are plenty of available materials to help guide you toward plan completion when you have the time to fill in the ideas you started today.

Questions on what this session will yield and how we'll proceed?

OK. Let's begin.



<b>FOCUS</b>	<p>Before you can make plans, you'll need to define two things:</p> <ul style="list-style-type: none"><li>• What is the reason for your lodge's existence today? Write two or three primary reasons that your lodge continues to exist.</li><li>• Where do you want to take it 5-7 years from now? Write two or three differences between where your lodge is today and what it needs to be 5-7 years from now.</li></ul>
<b>MISSION – Guiding Questions</b>	<ul style="list-style-type: none"><li>• Who are your clients, your patrons, your regulars, and your target audience?</li><li>• Who derives the most benefit from your lodge's existence? Examples of people or groups who derive value from a local lodge (non-exhaustive): Membership. Charities. Families. Community.</li><li>• And what is that value that they get?</li><li>• What are the key things that keep people coming to your lodge? Examples for reasons why people seek out their local lodge (non-exhaustive): Fraternity. Social club. Facilities. Grounds. History preservation. Safe haven. Youth. Ritual. Education. Leadership. Scholarships. Food pantry. Quiet philanthropy.</li><li>• If your lodge went away today, who would hurt the most and why?</li></ul>
<b>MISSION STATEMENT</b>	<p>At this point, there is enough to write a Mission statement.</p> <p>The purpose of my lodge is to provide xxx (benefit) to yyy (beneficiary).</p>



**KANSAS FREEMASONS**  
ON THE LEVEL

**VISION –  
Guiding  
Questions**

Imagine it is the year 2016, 2017, or 2018. Describe your lodge in one or two sentences if it was able to do whatever it wanted to be the best it can be.

If you had no resource constraints, what could you do to make your lodge the best?

Define lodge in terms of being the absolute best – what does absolute best look like? What does success look like? What does Mission fulfillment look like?

If everyone helped, how much better could you accomplish your mission that you can't do now?

Without constraints and with all the resources and people supporting you needed, would you have the same Mission or could you take on a different path? What path would that be?

If there were no hurdles or barriers, what would you do to improve accomplishing your mission better?

If you had plenty of free time and no personal obligations, what would you do to improve the lodge and make it the best at what it can do well?

**VISION  
STATEMENT**

At this point, you have enough information to write a Vision statement. Limit your vision to the top two or three ideal states.

In 5 – 7 years, I want my lodge to <vision(s)>



**KANSAS FREEMASONS**  
ON THE LEVEL

**FOLLOWING  
WINDS and  
POTENTIAL  
FISSURES**

Now that you've decided the current and future state of your lodge, assess the environment (or reality) you find the lodge operating in today.

Prepare a SWOT – Identify Strengths, Weaknesses, Opportunities and Threats that can help or hinder your pursuit.

**Strengths**

List three of your lodge's strengths. Strengths are internally oriented.

What does your lodge do well?

What are your lodge's core competencies?

If you ask your members what are the best attributes of the lodge, what would they answer?

**Weaknesses**

List three of your lodge's weaknesses. Weaknesses are internally oriented.

What does your lodge do poorly?

What activities or assets can be abandoned or improved?

What things embarrass the lodge when dignitaries, candidates, or first time visitors show up?

What does the lodge do that gets no or negative return on its investment ?

Do you have hecklers or detractors in your membership that cause rifts, impede progress, demoralizing, or shoot down good ideas?



**Opportunities**

List three opportunities available to your lodge. Opportunities are normally external to the lodge.

What or who are your lodge's greatest allies?

Who or what can the lodge rely on for external support?

Are there others to who the lodge can go to for support that have not been asked?

Does the lodge have friends in industry or commerce that could enhance mission accomplishment, if asked?

Are there Appendant Bodies with whom you can ally?

Are you in a position to get grants? Historical designation? Renters for your dining room? Donors for things the lodge does or produces?

What other great ideas have your members had that had been dismissed without real reason?

**Threats**

List three threats against your lodge. Threats are those things that, if not properly addressed, can derail a lodge from its plans.

Does your lodge have problems paying taxes, insurance, rental, or meeting any other obligations?

Is there competition or diminishing demand for fund-raising methods?

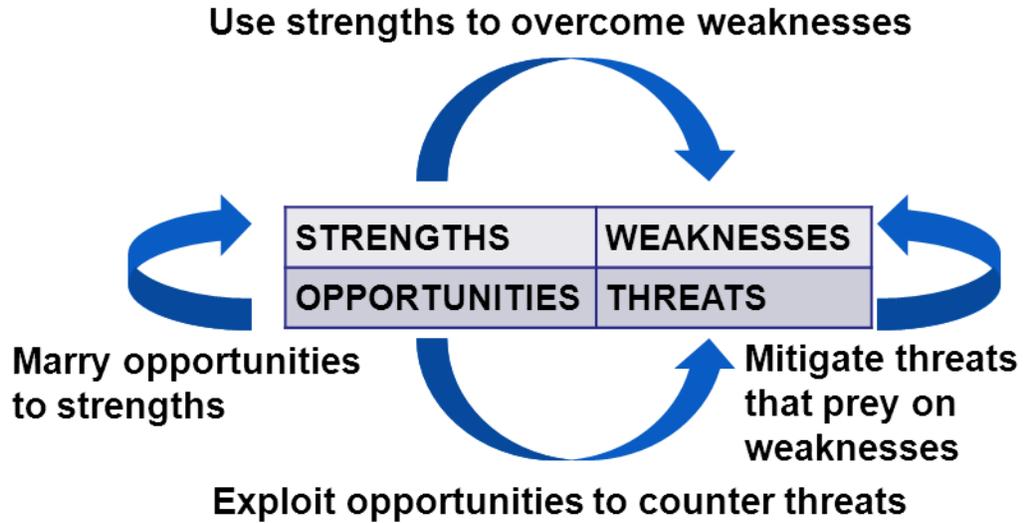
Are your facilities in bad shape or is there a high risk of pending problems such as a roof leak?

Are there external forces, such as activists, that are giving your lodge bad press or gossiping?



**Analysis**

Take a look at your four SWOT lists and perform a quick analysis.



Are there any opportunities that can enhance your strengths?

Are there weaknesses that will be affected by threats?

Can strengths be applied to overcome weaknesses?

Can opportunities be applied to counter threats?

This is the environment. These are not boundaries. These can help steer you in determining how to best choose paths for your Vision.

The SWOT helps with fine tuning the plan and subordinate projects. It's akin to knowing what you can and cannot change and then concentrating on what you can change.

Although you can go in any direction you want, knowing the environment can help you:

- Exploit your strengths and marry them with opportunities.
- Shore up weaknesses to ensure threats cannot take advantage of them.



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ON THE LEVEL

<b>FINDING the WAY</b>	You now know your lodge’s purpose (Mission), the environment in which it is operating (SWOT), and where you want to take the lodge in the next 5 to 7 years. Now you have enough information to write one, two or three statements on what “there” looks like: Goal(s).
<b>GOALS – An excellent example</b>	<p>An excellent example of a goal is JFK’s Moon challenge. The Mission was to ensure the security of the United States during an era of extreme tension between the US and the USSR. The Vision was to be first to capture the high ground, in this case, by being first to the moon. This was a very ambitious target that was beyond the capabilities of humankind to that point. To many, the goal was impossible to achieve. And it was very risky. But we know the outcome and the results have been untold advances in science, technology, medicine, textiles, food, and the primary purpose of the Vision, the high-ground that help avert global thermo-nuclear war and made Star Wars possible in later years.</p> <p>Now write one, two or three goals – descriptions of stakes you are planting in the distance of time that you must reach in order to make your Vision a reality.</p> <p>Although your goal statements don’t have to follow any specific format, they should, when complete, convey enough information to the most casual reader that they can understand and rally to the goal. The statement is not so much how you will get there. It is more a statement of where you will be after time elapses.</p> <p>Do not concern yourself in a Goal statement as to how you will get there. Goals describe the waypoints.</p> <p>If you use JFK’s goal as a model: I believe this lodge should commit itself to achieving the goal, that by &lt;timeframe&gt; , we will have achieved &lt;an ambition that achieves your vision&gt;.</p>
<b>GOALS – Guiding Questions</b>	<p>In order to reach your vision, what one major thing or things need to be accomplished?</p> <p>Without regard to exactly how it will be done, what must be done in order to get to the stake in the future you’ve placed for yourself?</p>



## **KANSAS FREEMASONS**

ON THE LEVEL

Imagine it is 2017 and you have accomplished your vision and are looking back to October 1, 2011, what one, two or three major things had to happen for you to get where you are today?

What is the most pressing, big bridge you must build in order to get where you want to be in the future?

How far can you go if your lodge does exceedingly well what it does today?

What is it that your lodge can accomplish that you can set the bar on much higher?

What stretch idea state can your lodge attain if everyone made the herculean effort to work together and achieve it?

### **GOALS**

At this point, there is enough to write a set of Goal statements. In order to serve YYY (group) with XXX (service) better, we need to accomplish ZZZ (projects or tasks) by AAA (timeframe). No matter what size lodge you have, limit your goals to no more than three.

Lodge size determines scope based on available resources like people, time, money, etc.



**FITTING the  
PIECES into  
PLACE**

Now that you have stretch goals, next step is to begin breaking them down into manageable chunks.

The idea at this point is to lay out a roadmap. You want to reach certain points at certain times to reach your overall goal.

The manageable pieces are objectives.

Objectives can be volunteered for or assigned so everyone gets to have ownership of the overall accomplishment. They have clear “exit criteria” so no one is stuck for indefinite periods of time. And most of all, there is a sense of accomplishment along the way to your lofty goals.

Having trouble prioritizing? Take a look at the Grand Lodge strategic plan and see if that helps.

**SMART  
Objectives**

Objectives or milestones should SMART by have the following characteristics:

**Specific** - with enough detail to communicate what is to be accomplished.

**Measurable** - the end state should be unambiguous so success can be attainable and celebrated.

**Achievable** - stretch objectives are what you want but it cannot be so monumental that it is clearly unachievable.

**Relevant** - the objective must be a building block in the overall goal or it doesn't support achieving your strategic plan.

**Time Bound** - nothing motivates like a deadline and even if you have to fine tune the planned end date due to various unknowns you encounter along the way, a target date is necessary to keep everything on track.

**OBJECTIVES –  
Guiding  
Questions**

For each goal:

What is the series of high-level tasks that need to be completed to get from here to Goal accomplishment?

What can be divvied up and assigned to people as tasks to accomplish along the way?

What are the vital activities that must be performed in a certain time allotment



## **KANSAS FREEMASONS**

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in order to reach the Goal on the date specified?

What time-bound missions need to be completed to reach your goal?

And in what order?

Are some tasks dependent on others to complete before they can be started or completed?

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### **OBJECTIVES**

At this point, there is enough to lay out a roadmap. Set specific milestones toward your goals with SMART objectives. At this point, just rough in the framework. If you made it this far in the planning session then keep writing. You're on a roll. Don't stop. Capture as much detail as possible. But don't be afraid to allow others to refine and redirect when you take this back to your lodge.



**FINISHING  
WELL**

You're ready to take your plan outline back to your lodge and assemble the leadership and interested brothers and work on the plan.

Fill out the details.

Ensure the goals have SMART objectives that can be divvied out for accomplishment. Hold people accountable so they get their pieces done on time.

Celebrate successes along the way.

Use failure to reset objectives but continue toward your desired end state.

**Communicate**

And most of all, communicate, communicate, communicate. As soon as talk about the strategic plan dies, so does the plan. At the very least, the lodge elected leadership should embrace the plan as a team so multiple-year, tough stuff can get accomplished.

Revisit planning annually to ensure the long-range goals are still relevant. The strategic plan is a map. Your destination may be hard and fast, but there are many routes to get there. When one way gets blocked, reassemble the troops and brainstorm other ways and re-write your objectives.

And did I mention communicate, communicate, communicate? When you keep the message going, it will become part of the lodge DNA and everyone will start pulling the rope in the same direction.

And share your plan with GL so others can get a boost or maybe find synergy and give you an unexpected boost. If GL knows what lodges need to succeed, GL will adjust accordingly.



## **KANSAS FREEMASONS**

ON THE LEVEL

### **Conclusion**

You've done the hardest part - thinking about the future you want for your lodge.

You've captured a rough outline.

This is a great start.

Contact your DDGM, a member of the Leadership Committee, or the Grand Lodge office if you need further assistance or resources to help you plan.

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### **Wrap-Up**

Lots of resources- books, software, Internet links, etc.

Focuses on service/people rather than profit

You should have an outline, not a plan. Go back to your lodge and fill in the rest of the details.

Sharing is encouraged. But each lodge should have own unique plan tailored to their wants and needs.

This will be very fast paced. This is meant to get you going on a plan or think about how to refine what you already have.

At the end, you should have notes and ideas and hopefully the motivation to keep going and fill out a plan. The more details you put in the plan, the fewer issues you'll have to solve later.

But don't wait until the plan is 100% complete. The plan should be a living document. The value is in execution, not the plan itself.