



The Antient Fraternity of Free and Accepted Masons of England
THE PROVINCIAL GRAND LODGE
and
ROYAL ARCH CHAPTER OF DURHAM

Learning and Development Team



1. Getting Started with Lodge Planning - Preparation

We have put together this module to help you to navigate the steps needed to complete a comprehensive Lodge Plan. If all the steps are completed, you will be able to Understand your Lodge, it's Values, where you want to be in years to come (Development Plan), Your Profile and be able to explain to prospective members exactly what your Lodge is about. If followed completely, the whole process takes about four months from start to finish and will need someone or a group of you who is/are prepared to drive it forward.

However, the document is split into six sections and each is designed to be a stand alone document in it's own right so that you can dip in and out of it as needed over whatever time frame you choose.

The green boxes are the steps you might consider whilst the yellow boxes are links to guidance to help you. **The yellow boxes will link you to the appropriate guidance documents.**

We hope you find it useful.

Writing a Lodge Plan starts with the Lodge (All members) wanting to do some things differently.

The Lodge agrees that a Lodge Plan would be useful and needs to consider who in the Lodge is best placed to drive the planning.

The Lodge needs to decide who will take on the role of **The Lodge Membership Officer**. This is an important Office but **The Lodge Membership Officer can not work alone and should be part of a wider Lodge Membership Team**

Preparation Phase

Prepare your membership for Lodge Planning. Inform them of the reasons why you think planning is important, who is taking on which roles in your Lodge e.g. Mentoring, Almoner etc and what you will be expecting of the wider membership.

This is an important step to gather as much support as you can for the process.

Also, prepare your Lodge Membership Team for Lodge Planning - who will do what, how often will you meet etc.

All members of the Lodge need to be given the opportunity to be involved

Buy in from the members, especially the senior members is essential

It is recommended that you start your journey by preparing your members for the Members' Pathway by circulating this document. This is an interactive pdf and is therefore most useful in a digital format.

Members' Pathway - Quick Start Users Guide

Role Profile of the Lodge Membership Officer

In those Lodges with small numbers, this role can be shared out if necessary but it is essential that it is supported by other Lodge members

The Lodge Membership Officer (LMO) is a member of **The Lodge Membership Team** and, together with other members, co-ordinates the Lodge's activities through the Members' Pathway. His suggested focus is on those activities from review and planning through to the candidate's election.

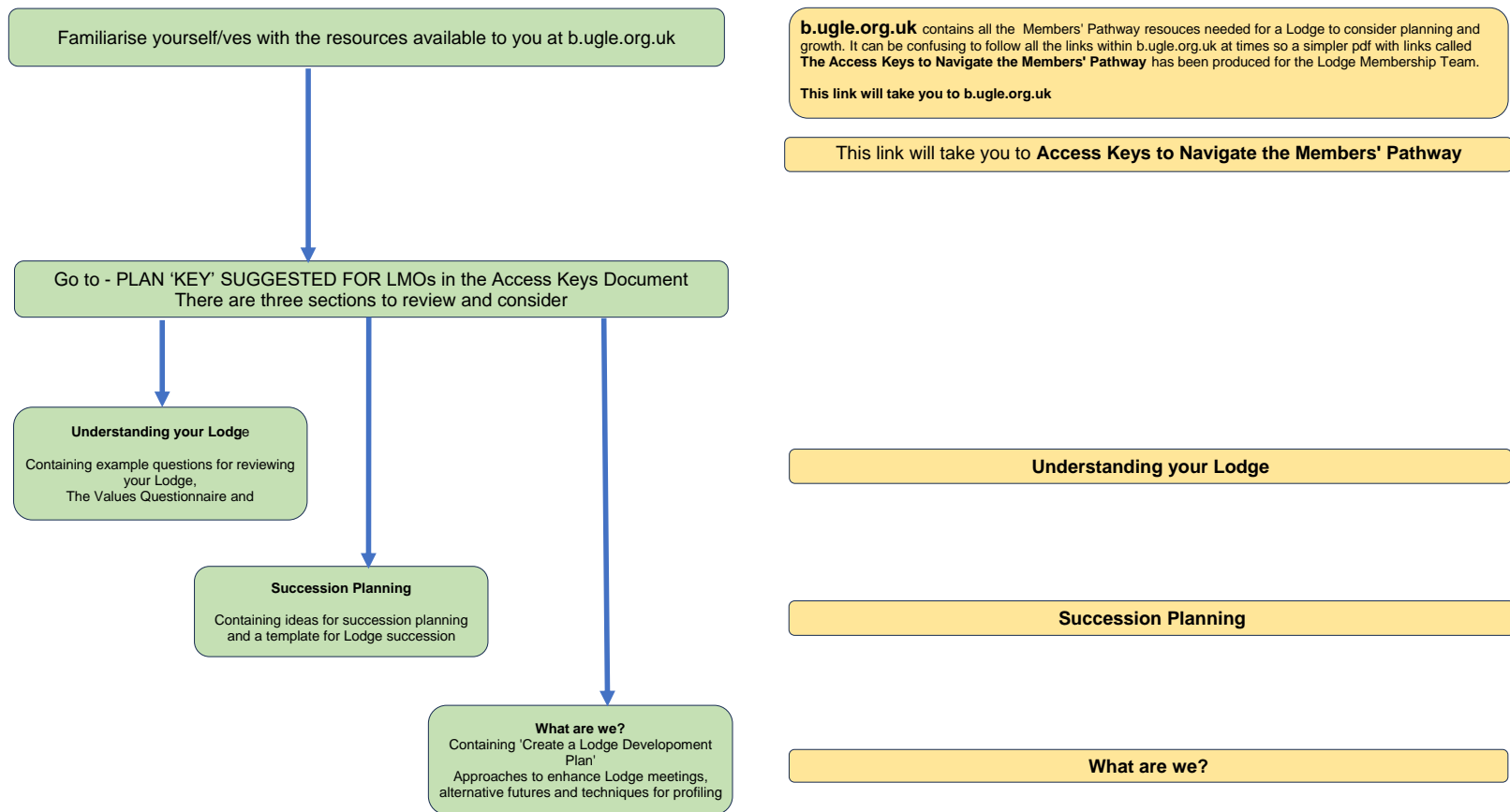
Preparation is essential to ensure that your members are involved. The Lodge Membership Team needs to consider all your membership and the best ways to communicate with them. Some may prefer a letter/written word, some prefer emails, some social media and others prefer platforms such as WhatsApp etc.

Understanding your Lodge is a useful first read

2. B4 You Start - Key Resources

There are some Key resources that you can tap into to help you to quickly and easily find information. The whole of the library of the Members' Pathway sits on the website **b.ugle.org.uk**

This library is comprehensive and contains all additional information to what is presented here. However, for quick and easy access, the document '**Access Keys to Navigate the Members' Pathway**' is recommended. It contains support for the Lodge Membership Officer, The Lodge Mentor and the Lodge Almoner in a quick and easy access format. You can download a .pdf copy of this to your desktop if needed.



3. Ease into your Planning Journey

Start with the Values Questionnaire. It will help you to gain some experience of using surveys and how to collect and collate results. It will also tell you much about how your Lodge works.

When you are ready to start your Planning journey prepare your Lodge members by informing them you will be sending out some questionnaires for them to complete and set a time frame for the return of the questionnaires.

Explain that once you have received the answers to the questions you will be arranging a meeting - either face to face or virtual - to discuss the results. Inform the members of the

The Values Questionnaire is a good place to start. It will help you gain experience of how to run surveys in your lodge. Ensure you add a closing date for completion.

This can be sent out manually in written form or can be easily adapted to an online form eg Google forms

Send out the Values Questionnaire to your members and ask them to return their responses by the closing date.

You may need to send out a reminder a week later

Collate the responses to the Values Questionnaire and map onto the circle prior to your meeting

Share the collated responses with your members and discuss the results at your meeting.

Listen to the discussion and your members' thoughts of the Values exercise and record them as best you can.

Much will come out of this that you will find of interest and you will find that you start to build an idea of what are the important values within your Lodge.

Feedback the notes from your discussion to your whole membership. You will find that it starts a conversation about Lodge Planning

The Values Questionnaire

When you are happy to take the next step, this link will take you to the Values Questionnaire.

Consider how you will circulate the questionnaire to your members. You may need to make a paper copy for some members whilst others will respond to a Google survey sent by email. Be prepared to offer support to all

For support on how to build a Google form click [here](#)

We have designed a learning module for The Values Questionnaire which you can find in the Members' Pathway section of the Provincial website to assist you if needed.

After plotting the survey results in the quadrants in the circle share the results showing the four quadrants.

If most of the names are in **quadrant 1** (comprising the "Better man", "Mystic" and "Pure Curiosity" values) then the Lodge is probably one in which most members seek to explore and learn about the Craft as a way of satisfying an underlying curiosity, and perhaps to grow and develop as a man as a consequence of the understanding obtained.

If most of the names are in **quadrant 2** (comprising the "Better man" and "Sociable altruism" values) then the Lodge is probably one in which members want to feel that they are part of an organisation that is charitable and has an impact on society, built on a value system they shared with like minded people.

If most of the names are in **quadrant 3** (comprising the "History & Tradition" and "Family Connection" values) then the Lodge is probably one in which members want to feel that they are part of an organisation that has a sense of continuity, that safeguards an important set of values or principles and is made up of people with an intrinsic interest in history and tradition. It may also represent an opportunity to continue in a fraternity that has a tradition within the family. The Lodge is also likely to strongly value its ritual.

If most of the names are in **quadrant 4** (comprising the "Escape!" and "Because of a Friend" values) then the lodge is probably one in which members want to feel that they are part of a Lodge that is a refuge from the stresses of their normal work environment and where they can just enjoy being with friends in a sociable and friendly male only environment.

Quadrant 4 also includes the "Respect & Status" value. Members who score highest on this tend to have a primary desire to be associated with an organisation that brings them a feeling of being part of an "exclusive club".

4. More Advanced Planning #1

Your membership should now be used to the idea of doing questionnaires and surveys. Conversations about the Lodge may be starting to take place.

It may seem like the right time to jump straight into the next steps but at this stage it is better to take the time to revisit, read and consider the 'Understanding your Lodge' section again. You will feel more equipped to discuss and explain the next steps with your Brethren before you start the final phase of Creating a Lodge Development Plan and a SWOT analysis.

Take the time to revisit, read and consider the 'Understanding your Lodge' section again in the Keys. Once you are happy to continue move onto the next steps

The next logical step is to 'Create a Lodge Development Plan'. See the attached link for some useful information about how to go about it.

Check out the section 'example questions about how to go about reviewing your lodge' which has a useful set of questions in section 1.3 that you can ask your members regarding their views on various aspects of Lodge life.

Setting up a google form with the questions is the most efficient way to go about sending out the questionnaires but some members may need a hard copy

Send out the Questionnaire and set a closing date for receiving the responses.

Collate the responses to your questionnaire and share the collated responses with your members. You do not need to comment on them at this stage.

Arrange your meeting to discuss the results.

Listen to the discussion and your members' thoughts and record them as best you can.

You are now building an idea of what are the important values, issues and development opportunities within your Lodge.

Feedback the notes of your discussion to the membership and inform them that the next step is to carry out a SWOT analysis

Understanding your Lodge

Create a Lodge Development Plan

Example questions for reviewing your lodge

How would the Lodge be described in terms of its (suggested questions to ask);

Ritual (eg, it seeks excellence / members help people to do their best / ritual is shared out among new members / ritual is shared out among Past Masters, etc) -

Lodge traditions - Education about Freemasonry - Communication (eg, all communications are read in full at meetings / communications are sent to members as they are received / kept to the minimum in the Lodge meeting) -

Meetings (eg, meetings are enjoyable / dignified / brisk / attract visitors / rarely have visitors, etc) -

Festive board (eg, formal seating / buffets / full toasts always given / abridged toasts / white table once a year, etc) -

Social events (eg, no social events / formal events / informal events / attract interested non Masonic guests / at Lodge meetings / never at Lodge meetings, etc) -

Charity (eg, charities supported / use of Relief Chest or Benevolent Fund / how decisions are made / fundraising methods, etc) -

Support for new members (eg, planned mentoring / involvement / Lodge of Instruction, etc) -

Care for members in need of support (eg, illness / mobility / mental health / financial difficulty, etc) -

Contact with absent members (eg, those who occasionally miss meetings / those who regularly miss meetings / those who never attend) -

Which of these aspects of Lodge life should continue unchanged?

5. More Advanced Planning #2

The second part of the Planning process is to carry out a SWOT analysis. It is simply asking the membership what they consider to be the Lodge's Strengths, Weaknesses, Opportunities and Threats. Follow the same procedures as before sending out a questionnaire and collating the results before feeding them back for discussion at a subsequent

Send out a further questionnaire to ask the membership what they consider to be the Strengths, Weaknesses, Opportunities and Threats to the Lodge.



Collate the responses to your SWOT questionnaire and share the collated responses with your members. You do not need to comment on them at this stage.

Arrange your meeting to discuss the results.

Listen to the discussion and their thoughts and record them as best you can.

You can find out more about the **SWOT and Action Planning here - Create a Lodge Development Plan**

6. Final Phase

You are now entering the final phase. You will have the results of your Values Questionnaire, The Development Plan and your SWOT. Try to pull the discussions together into meaningful themes eg we need to strengthen Mentoring, change our LOI, think about Service more etc. using this information, write your Development plan using the ideas in 'Understanding your Lodge' and start thinking about your actions going forwards to develop the Lodge further.

Once the SWOT is complete you now have all the pieces in place to build your Development Plan/Profile/Outline.

Review the results and start to build your Development Plan and document to understand your lodge. You can get more information to help you from the 'Understanding your Lodge' section of the Keys

As you build your Development Plan you will find that some things stand out from the discussion eg, stronger mentoring for new Masons, improved social events etc.

Understanding your Lodge

Consider which are the main areas for development and start to think about who will do what. These are your priorities.

Fill in the action and time frame grid to start to move things forward.

Don't forget to add regular review into your Plan

Create a Lodge Development Plan contains an example Action Planning Grid

You should now have a comprehensive document which covers many aspects of your lodge from its members profile to charity engagement to mentoring to socials to community engagement.

Consider it as a plan for 5 years which is flexible and can change.

Share it with your members and engage as many people as you can going forward. It is their Lodge and their Plan.

Well Done! You have completed your Lodge Planning Journey