

The Leader



A publication for leaders of
California Freemasonry

July 2015

BEST PRACTICE: Leading for a well-rounded lodge

Crow Canyon Lodge No. 551 has been a vibrant and active lodge for a very long time. Its teachers' awards program goes off without a hitch each year. The Child ID booth is well staffed at all the usual fairs, rodeos, and schools. Stated meeting dinners consistently pack in a crowd. But in recent years, the lodge has been going through an evolution, prompted by a steady stream of younger members with big ideas. The result has been a balancing act between tradition and innovation.

Master Robert Pinkerton explains.

Background: Our lodge is an eclectic group, and really believes that Masonry is all about getting along and accepting one another. We've always been culturally diverse (at least five religions are represented, that we know of), and now we're becoming more diverse in age, too, with brothers from their 20s to their 90s. So, we've been trying to round out our lodge programming, with a focus on inclusivity and innovation.

The traditions

Our long-time members value the social atmosphere of our lodge, as well as our traditional community programs.

- Our stated meeting dinners are typically attended by 50-80 people, including brothers, spouses, partners, and guests. We try to serve special food at holidays, like Mexican food for Cinco de Mayo and a traditional Seder dinner during Passover. At our July dinner, local youth orders will give a flag presentation and a Rainbow Girl will give a speech about what the flag means to her and her family.
- We host Child ID booths throughout the year at the local rodeo, fair, and schools, often with the help of our Masonic youth orders and Eastern Star chapter.
- Every Public Schools Month, we recognize two local teachers and donate money to the high school's music program.
- Every July we run the Strawberry Feed at the nearby Masonic Home at Union City.
- In August, we'll hold a family picnic at a neighborhood park.

The innovations

Our younger members, in particular, crave history and formality. They want every gathering to be special. So we've made some programming changes and additions over the past couple years.

- We started wearing white gloves at stated meetings and degrees, as permitted.
- Thanks to the initiative of two brothers, one younger and one older, we now hold a Feast of St. John twice a year. The event is uniquely structured, which our new members like, but it's also a social experience.
- This year we kicked off a new annual tradition, a White Table Night, to express our appreciation for officers' wives. We book a DJ and set the dining tables with fine china, glassware, and candles. All lodge members and their significant others can attend.
- A group of our younger members started their own Masonic history and education club, the Dead Masonic Poet Society. Between 12 and 25 brothers attend each monthly meeting. The next event will feature a visiting speaker who will talk about the difference between the first degree in England and the U.S.

- In the past, we've held ritual practice on non-stated meeting weeks. Recently, we've opened up those nights to all members as a lodge of instruction. One lodge of instruction addressed the proper way to conduct a Masonic funeral. Another focused on how to interview a candidate. A future topic will be candidate coaching – another area where our younger members are getting involved.

Advice to other lodge leaders

- When a member comes to you with a project idea, say yes – *if* he's willing to manage it himself. If it means something to him, he will. That's how many of our new programs got started.
- Don't be afraid to try new ideas. And don't expect change overnight. It's like the old saying: How do you eat an elephant? One bite at a time.

I'm really proud of our lodge. We have an energetic group of guys who work together to get things done. Being around them has rejuvenated my experience in Masonry.

Contact: [Robert Pinkerton](#)

HOW-TO: Start a lodge legacy

A Masonic lodge can be many things at once, from a social outlet to a source of serious introspection. What legacy does your lodge want to leave: A record of community service? A friendly culture? A commitment to education? Here are 10 tips to help lay the groundwork.

Identify a shared vision

- A legacy is an extension of your lodge's identity. Pay attention to what members care most about. Look for trends in attendance and feedback.
- Schedule a meeting of current and incoming officers. What does everyone hope to accomplish in the years to come? Which goals overlap and work together?
- Review your lodge strategic plan for one or more long-term goals, and discuss which might be considered a "legacy goal."
- Identify some shorter-term initiatives to begin building your legacy. For example, if you want to be known for community service, brainstorm a few key volunteer projects. If you want to be known for your ritual, set attendance goals for ritual practice.

Get traction

- Announce your legacy vision to the membership. Create a special corner of the Trestleboard or set aside time at each stated meeting to discuss it.
- Schedule regular meetings of the lodge leadership to check in on initiatives.

Mobilize your membership

- Ask for member suggestions. If a member has a viable idea for a lodge initiative, let him coordinate the effort.
- When possible, involve other Masonic groups such as Eastern Star and local youth orders.

Spread the word

- Find a way to make your legacy visible. If your focus is on community service, commission lodge tee shirts or hats for volunteer events, or adopt a highway. If your focus is on Masonic education, expand the lodge library.
- If appropriate, raise community awareness by participating in social media and submitting press releases to local news outlets.

Whether you're re-envisioning your lodge as a beacon of philanthropy or a place for in-depth Masonic education, it may take several years for your initiatives to pay off. Be patient and persistent: Your efforts will endure for generations to come!

Find it on freemason.org

Secretaries, an updated Secretary Guide is now available for you on the Member Center. It's a resource tailored just to your office, filled with quick checklist reminders of your monthly responsibilities – plus recommendations to help you stay prepared and organized year-round.

Download the guide: Sign into the Member Center on freemason.org and select Resources and Publications, then Manuals and Guides.

Your June checklist

Stay on track of lodge business and prepare for important deadlines. Here's your July checklist:

Executive Committee

- Remind members to celebrate [Support Our Masonic Veterans Month](#)
- Attend or plan to attend a 2015 [Lodge Management Certification Program webinar or session](#)
- Along with the senior warden, identify and approach members for 2016 open elected and appointed officer positions
- Along with the senior warden, identify and approach members for the 2016 Audit, Membership Retention, and any other committees
- Set calendar for 2016 and identify event leaders

Senior Warden

- Along with the Executive Committee, identify and approach members for 2016 open elected and appointed officer positions
- Along with the Executive Committee, identify and approach members for the 2016 Audit, Membership Retention, and any other committees
- Set calendar for 2016 and identify event leaders
- Continue preparing 2016 budget
- Set installation date and approach installing officer, master of ceremonies, and chaplain
- Review all candidates' progress towards advancement

Secretary

- Begin preparing semi-annual report of membership activity, due in August
- Prepare to pay lodge per capita, due in August

Treasurer

- If your lodge has employees, don't forget about taxes:
 - File quarterly federal payroll tax form 941 (unless IRS has approved an annual filing of form 944, due in February)
 - File quarterly state payroll tax form DE9/DE9C and deposit form DE88
- Begin preparing semi-annual financial report, due in August

Hall Association

- Begin preparing semi-annual report, due in August

Questions? Contact Member Services at memberservices@freemason.org or (415) 776-7000.

Trestleboard and more

By partnering with Masonic Assistance, you can make sure your fraternal family knows where to turn when they need support.

A member who has had his dues remitted, or who is remiss on paying his dues, may be suffering financial difficulties or other hardships. Download this list of tips for reaching out to these members, and identifying those in need of Masonic assistance.

Download: **Guide for Reaching Out to Members With Remitted Dues (see next page)**
Distribute and discuss among lodge leadership and Outreach Committee.

Question of the month

Last month we asked how many of you attended Masonic leadership training in the past three years, including webinars, retreats, and academies. Of those who responded:

69% - yes

31% - no

Of those who attended recent leadership training (leadership retreats and Lodge Management Certification Program courses), 93 percent say they've made changes at their lodge as a result.

Respondents identified administrative improvements as the most helpful element learned through the courses, followed closely by coaching and community awareness. One member shared that his biggest takeaway was help bringing elder members back to lodge. "Their input is invaluable and we sometimes forget they've done it all before," he noted.



Guide for Reaching Out to Members With Remitted Dues

(888) 466-3642 | masonichome.org

Reach out to all members who have had their dues remitted, or who may need them remitted, to check on their well-being and to let them know that they are cared for by your lodge. Members who are 80 or older may be at the greatest risk of isolation.

Tactics and tips

- Contact Member Services at (415) 776-7000 for help locating members with remitted or unpaid dues.
- Contact members by phone or mail, and ask how they are doing. [Refer to the remitted dues phone call script.](#)
- Make in-person visits, using the [home visit checklist](#) and [needs form](#). This is the best way to gauge well-being and to show that the lodge cares. It's also the easiest way to learn about a member's safety, support network, transportation needs, and financial situation.
- If the member doesn't reside near the lodge, seek the help of a lodge closer by to pay a visit – ideally, with the prior permission of the member.
- While elder members are more often in need of help, follow up with all members with remitted or unpaid dues: Masonic Family Outreach Services offers resources for fraternal family members of all ages.
- Contact Masonic Assistance at (888) 466-3642 for case-by-case guidance.

Educate members about the support services available to them. **Call (888)466-3642** for information on all of the support services of Masonic Assistance.