



**What is Scottish Rite Life:**

- Scottish Rite Life is the experience of being a Scottish Rite Mason.
- Scottish Rite Life is living day to day with the knowledge that you have brothers from around the world that care for you and your family, and that you experience this care locally at every event and with each contact within the Valley.
- Scottish Rite Life is a culture of inclusion where all members of the Rite are treated with respect, care, and compassion.
- Scottish Rite Life is a process, generated by the programs that are developed to support the needs of members and their families.
- Scottish Rite Life is the gauge that the Rite uses to measure itself in all areas of operation, member service, and membership development.

Scottish Rite Life is the answer to the question, “Why should I be a Scottish Rite Mason?”



Scottish Rite Life for Seniors



Scottish Rite Life for Families



Scottish Rite Life on the Job



Scottish Rite Life for Students



Scottish Rite Life for Children



Scottish Rite Life for Couples

## Scottish Rite Life Check Up

How is your Valley doing? Are people standing in line before the office opens to secure seats for the next event? Is the reunion so full that you are setting up extra seats and renting shuttle busses to bring people in from remote parking lots?

While it may seem that these are unachievable expectations, there are organizations that are experiencing this degree of success of participation with a multi-generational membership base similar to ours. The process that you are about to embark upon is designed to help you improve the Scottish Rite Life experience for all members of your Valley.

Throughout this process you will be required to think objectively about “how” the functions of the Valley are accomplished. This may not be as easy as you first think. Have you ever seen someone walk out of a restroom with toilet tissue stuck to their foot? No matter which way they turn they can’t seem to see it, because “it” is hidden in the individual’s “*blind spot*.” Organizations have “*blind spots*” as well. History has proven that often times the “higher up” in the organization and the longer one’s tenure endures, the more difficult it can be to recognize these “*blind spots*”, it challenging for us to create change, simply because we’ve always done it that way. This in itself will provide you a prime opportunity to bring in some of your Valley’s newest members and let them share their insight.

The goal of this entire process is to develop a culture of inclusion where all members of your Valley feel a sense of pride in being a Scottish Rite Mason, believe that the programming in their local Valley is top quality and thus make it a priority in their schedule, and most importantly realize the value in being a Scottish Rite Mason.

The first step in this project has already been completed by your willingness to accept the responsibility and embrace changes that may come from this process. While the undertaking of this process will be no easy task, you will soon realize the excitement and the energy which evolves as your program unfolds this is no light responsibility it should be exciting and an energizing process as you see what could be. Your role at this point will not be to work “in” the Valley but to work “on” the Valley. The number of people that are required to complete this process will vary based on the size of your Valley, but a minimum of 11 people is required.

So gather your team and let’s get going! We’ve compiled a few exercises that will help you start developing the future of the Rite in your Valley.

For further assistance with this process or any questions relative to the material presented in this workbook, please contact:

Ill. Bro. Richard W. Elliot, Active Member, Supreme Council, A.A.S.R., N.M.J.

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Process Checklist

Complete    In Progress    Not Started

- 1. Accept Responsibility And Embrace Change .....  .....  .....
- 2. Assemble Your Team.....  .....  .....
- 3. Get To Know Your Audience .....  .....  .....
- 4. Event Review .....  .....  .....
- 5. Event Tweaking .....  .....  .....
- 6. Event Retirement.....  .....  .....
- 7. Planning For The Big One .....  .....  .....
- 8. No or Low Cost Events .....  .....  .....
- 9. Customer Service in Day to Day Operations .....  .....  .....
- 10. Data Entry and Maintenance.....  .....  .....
- 11. Planning for Widows and Orphans, Even Before They Are.....  .....  .....

## 2. Assemble Your Team

**Congratulations on being one of the first in your Valley to embrace the idea of creating the highest quality Scottish Rite Life Experiences possible for your Valley's most important customers - its members. The process you're embarking on is not a one or two person job. It is not a staff job, nor is it a purely volunteer job. This process will require a team of team of people, so let's begin!**

- How many people will be on this team? Either 11 or 15 depending on your Valley.
  - Please refer to the table in section 3 labeled Get to Know Your Audience in order to define the generational identifiers listed below:

<b>11 member Team</b>	<b>15 Member Team</b>	<b>Generational Identifier</b>
<b>3</b>	<b>5</b>	Millennial
<b>2</b>	<b>4</b>	Generation X
<b>2</b>	<b>3</b>	Baby Boomer
<b>1</b>	<b>2</b>	Silent Generation
<b>1</b>	<b>1</b>	GI Generation

- The **Suspect/Prospect/Commitment** table located in **Appendix A** will be useful in tracking your progress.
- What type of people will be needed? Not only a mix of age groups, but a mix of personalities as well will be needed to round-out your team.
  - Create a work team / committee with an equal balance of the following:
    - **DREAMERS**
      - Are oriented to the FUTURE
      - Ask the question WHAT?
      - Are often visually dominant.
      - Are considered right brain dominant.
      - Have a tendency to 'chunk up' (expand to the big picture).
      - Are almost always 'toward'.
      - Their strength is the ability to cast a vision.

- **REALISTS**

- Are oriented to NOW.
- Ask the question HOW?
- Are natural strategists.
- Are considered left brain dominant.
- Have a tendency to 'chunk down' to process.
- Their strength is the ability to think sequentially.

- **CRITICS**

- Are oriented to the PAST.
- Ask the question WHY?
- Have a tendency to 'chunk down' to detail and question it.
- Generally delete potential.
- Their strength is the ability to find all the problems & pitfalls.
  - *Critics are most often screened out of the process as being negative.*
  - *Learn to use the critic as your coach.*
  - *Help critics realize that they will not be allowed to sabotage the process or project.*
  - *Teach and encourage the critic to help you cull out all of the possible potholes and landmines before you get there.*
  - *Honor the critic's skills.*

- The successful development and maintenance of this team of people will be crucial to the on-going success of your Valley. This is not a short-term quick fix process.
- This team needs to be prepared for the challenging yet truly rewarding experience of being the catalyst for change in your Valley.
- They need to be passionate for Masonry.
- They need to be committed to the team concept and understand that change is needed. They need to understand that only by consensus will decisions be made.

### 3. Get To Know Your Audience

Run the **Age Summary** report from *MDS* and enter the data into the table below:

{Note that this table was formatted using the bracketed ages in the *MDS* report and labeling these brackets using Strauss & Howe’s breakdown of the generational theory. There is always overlap and these are provided as a general guide for your work.}

Age Range	Number in Group	Percent in Group	Generation
20-29			Millennial
30-39			Generation X
40-49			Generation X
50-59			Baby Boomer
60-69			Baby Boomer
70-79			Silent Generation
80-89			Silent Generation
90-99			GI Generation
100-109			GI Generation

- It is important to note that a generation being defined for a 20 year period causes overlapping in the table provided. However the core suppositions will hold true if a balanced program is offered.
- This table is to be filled out in pen or pencil and not carved into stone. As our membership ages, our “Boomers” will move down the rows as will all other generations, thereby reminding us that our program should be adaptable, just as the needs of our members change over time.

**Review the generational descriptions listed on the following pages keeping in mind the breakdown of your Valley’s membership:**

# GENERATION THEORY

From GENERATIONS by Strauss & Howe and other resources

**IDEALIST** – A dominant, inner-fixated IDEALIST GENERATION grows up as increasingly indulged youths after a secular crisis; comes of age inspiring a spiritual awakening; fragments into narcissistic rising adults; cultivates principle as moralistic midlifers; and emerges as visionary elders guiding the next secular crisis.

**IDEALIST** leaders have been cerebral and principled, summoners of human sacrifice, wagers of righteous wars. Early in life, none saw combat in uniform; late in life, most came to be revered as much for their words as for their deeds.

John Winthrop (MA), William Berkeley (VA), Samuel Adams, Benjamin Franklin, James Polk, Abraham Lincoln, Herbert Hoover, Franklin Roosevelt

Preachers, writers, Radicals, Publishers, teachers

Principle, Religion, Education

**REACTIVE** – A recessive REACTIVE GENERATION grows up as under protected and criticized youths during a spiritual awakening; matures into risk-taking, alienated rising adults; mellows into pragmatic midlife leaders during a secular crisis; and maintains respect (but less influence) as reclusive elders.

**REACTIVE** leaders have been cunning, hard-to-fool, realists, taciturn warriors who prefer to meet problems and adversaries one-on-one. They include the only two presidents who had earlier hanged a man (Washington and Cleveland), one governor who hanged witches (Stoughton), and several commanders who had led troops into battle (Bacon, Washington, Grant, Truman, and Eisenhower).

Nathaniel Bacon (VA), William Stoughton (MA), George Washington, John Adams, Ulysses Grant, Harry Truman, Dwight Eisenhower.

Entrepreneurs, brigands, industrialists, generals, salesmen

Liberty, Pragmatism, Survival

**CIVIC** – A dominant, outer fixated CIVIC GENERATION grows up as increasingly protected youths after a spiritual awakening; comes of age overcoming a secular crisis; united into a heroic and achieving cadre of rising adults; sustains that image while building institutions as powerful midlifers; and emerges as busy elders attacked by the next spiritual awakening.

**CIVIC** leaders have been vigorous and rational institution-builders, busy and competent even in old age. All of them, entering midlife, were aggressive advocates of technological progress, economic prosperity, social harmony, and public optimism.

Grudon Saltonstall (CT), Robert “King” Carter (VA), Thomas Jefferson, James Madison, John Kennedy, Ronald Reagan.

Statesmen, scientists, economists, diplomats, builders

Community, Technology, Affluence

**ADAPTIVE** – A recessive **ADAPTIVE GENERATION** grows up as overprotected and suffocated youths during a secular crisis; matures into risk-adverse, conformist rising adults: produces indecisive midlife arbitrator-leaders during a spiritual awakening; and maintains influence (but less respect) as sensitive elders.

**ADAPTIVE** leaders, reflecting a more complicated mixture of passive and aggressive masculinity, have been advocates of fairness and the politics of inclusion, irrepressible in the wake of failure. With exception of Andrew Jackson, all those listed rank among the most expert and credentialed of American political figures.

William Shirley (MA), Cadwallader Colden (NY), John Quincy Adams, Andrew Jackson, Theodore Roosevelt, Woodrow Wilson, Walter Mondale, Michael Dukakis.

Artists, lawyers, therapists, legislators, statisticians

Pluralism, Expertise, Social Justice

- There are two types of social moments: **SECULAR CRISES**, when society focuses on reordering the outer world of institutions and public behavior; and **SPIRITUAL AWAKENINGS**, when society focuses on changing the inner world of values and private behavior.
- An **AWAKENING ERA** (Idealists coming of age) triggers cultural creativity and the emergence of new ideals, as institutions built around old values are challenged by the emergence of a spiritual awakening.
- In an **INNER-DRIVEN ERA** (Reactives coming of age), individualism flourishes, new ideals are cultivated in separate camps, confidence in institutions declines, and secular problems are deferred.
- A **CRISIS ERA** (Civics coming of age) opens with growing collective unity in the face of perceived social peril and culminates in a secular crisis in which danger is overcome and one set of new ideals triumphs.
- In an **OUTER-DRIVEN ERA** (Adaptives coming of age), society turns toward conformity and stability, triumphant ideals are secularized, and spiritual discontent is deferred.

*From GENERATIONS by Strauss & Howe and other resources*



*COLONIAL CYCLE*

<b>PURITAN</b>	<b>-----1584-1614-----</b>	<b>Idealist</b>
<b>CAVALIER</b>	<b>-----1615-1647-----</b>	<b>Reactive</b>
<b>GLORIOUS</b>	<b>-----1648-1673-----</b>	<b>Civic</b>
<b>ENLIGHTENMENT</b>	<b>-----1674-1700-----</b>	<b>Adaptive</b>

*REVOLUTIONARY CYCLE*

<b>AWAKENING</b>	<b>-----1701-1723-----</b>	<b>Idealist</b>
<b>LIBERTY</b>	<b>-----1724-1741-----</b>	<b>Reactive</b>
<b>REPUBLICAN</b>	<b>-----1742-1766-----</b>	<b>Civic</b>
<b>COMPROMISE</b>	<b>-----1767-1791-----</b>	<b>Adaptive</b>

*CIVIL WAR CYCLE*

<b>TRANCENDENTAL</b>	<b>-----1792-1821-----</b>	<b>Idealist</b>
<b>GILDED</b>	<b>-----1822-1842-----</b>	<b>Reactive</b>
<b>PROGRESSIVE</b>	<b>-----1843-1859-----</b>	<b>Adaptive</b>

*GREAT POWER CYCLE*

<b>MISSIONARY</b>	<b>-----1860-1882-----</b>	<b>Idealist</b>
<b>LOST GENERATION</b>	<b>-----1883-1900-----</b>	<b>Reactive</b>

*From GENERATIONS by Strauss & Howe and other resources*

- Remember Charles Lindbergh landing in Paris
  - In youth saw World War I & Prohibition
  - In rising adulthood experienced the Great Depression & WWII
  - In midlife saw America rise to superpower status
  - Rise in the Scouting movement
  - Child labor was cut in half
  - Children began to receive allowances
  - First astronauts
  - Confident & rational problem solvers
  - Do it big & do it together
- Lower rates of suicide and crime
  - Higher aptitudes
  - Greater educational attainment
  - Increased voter participation
  - Rising confidence in government
  - Experienced the ‘American Dream’ more than any other generation in history
  - Most affluent elders in the 20<sup>th</sup> century American Association of Retired Persons has become the largest and wealthiest advocacy organization in the nation

**Peers:**

John F Kennedy  
 Ronald Reagan  
 Ann Landers  
 John Steinbeck  
 Robert Oppenheimer  
 William Westmoreland

Walt Disney  
 Lee Iacocca  
 George Bush  
 Bob Hope  
 John Wayne  
 Katherine Hepburn

Walter Cronkite  
 Billy Graham  
 Judy Garland  
 Sidney Poitier  
 Joe DiMaggio

**Best way to communicate:**

Newsletter, Formal Letters

Newsletter is listed for all because everyone has a mailing address and will have access to the information.

*From GENERATIONS by Strauss & Howe and other resources*

- Born during an era of depression & war
- Lowest population growth rate in American history (7%)
- Earliest marrying & earliest baby bearing generation
- The arrival of the divorce epidemic
- Rise in careers in helping professions
- Highly influenced by public opinion, Opinion rules
- Institutionalized second guessing
- Entering midlife, fueled a boom market in:
  - Dietary aids
  - Exercise classes
  - Cosmetic surgery
  - Hair replacements
  - Relaxation therapies
  - Psychiatric treatments.
- Have not produced a president.

**Peers:**

William F. Buckley, Jr.  
Gore Vidal  
Marilyn Monroe  
Dr. Martin Luther King, Jr.  
Sandra Day O'Connor  
Clint Eastwood  
James Dean  
Pat Schroeder  
Walter Mondale  
Jesse Jackson

Elvis Presley  
Geraldine Ferraro  
Woody Allen  
Phil Donahue  
Abbie Hoffman  
Jack Nicholson  
Ted Koppel  
Barbara Streisand  
Jack Kemp

**Best way to communicate:**

Newsletter, Formal Letters, Postcards

Newsletter is listed for all because everyone has a mailing address and will have access to the information.

*From GENERATIONS by Strauss & Howe and other resources*

## ***MILLENNIAL CYCLE***

### **BABY BOOMER GENERATION**

**1943-1960**

**Idealistic**

- No generation of kids ever got more shots or had more operations
- Migrated out of 'established' organizations
- Hippies
- Turn on - Drop out
- Into ideas & causes
- The Beatles
- The Rolling Stones
- Bruce Springsteen
- Vietnam War
- Sexual revolution
- Woodstock
- A time of worsening trends:
  - SAT begins a 17 year decline
  - Rise in illegitimate births
  - Rise in teen unemployment
  - Rise in crime rate
- Dual income households
- Turned against the 'establishment'
- "A generation that when young, trusted nobody over 30, today trusts nobody under 30."

### **Peers:**

Oliver North  
Janis Joplin  
Angela Davis  
Steve Martin  
Donald Trump  
Gilda Radnor

David Letterman  
Jerry Mathers  
Jane Pauley  
Oprah Winfrey  
Patty Hearst  
Bill Gates

John McEnroe  
Bill Bradley  
Newt Gingrich  
Dan Quayle  
Albert Gore Jr.  
Bill Clinton

### **Best way to communicate:**

Newsletter, Formal Letters, Postcards, Website

Newsletter is listed for all because everyone has a mailing address and will have access to the information.

*From GENERATIONS by Strauss & Howe and other resources*

- Disillusioned
- Most aborted generation in history
- Abandoned
- Want a high quality of life
- Independent and defensive
- Comfortable with change, seek change
- High value on relationships
- **Tribal**
- Give them leadership roles
- More sensitive to people
- Pluralists and flexible
- Pragmatic
- Post moderns
- Attracted to a group by being attracted to what's happening in the lives of group members
- Process truth better relationally than propositionally
- Can be reached by storytelling
- Want programs to be rousing
- Use fresh methods - video, music, drama, personal stories
- Emphasize compassion ministries
- Let them fail
- Let them lead
- The Four D's:
  - Divorce
  - Diversity
  - Day Care
  - Debt

Felicity Barringer in the New York Times, older Americans are coming to perceive them as “a lost generation, an army of aging Bart Simpsons, possible armed and dangerous.”

**Peers:**

Michael J Fox,  
Eddie Murphy,  
Jon Bon Jovi,  
Tom Cruise  
Michael Jordan,  
Whitney Huston,  
Len Bias,  
Brooke Shields,  
Mike Tyson,  
Lisa Bonnet

Mary Lou Retton,  
Moon Unit Zappa,  
Gary Coleman,  
Jennifer Caprati  
Leonardo DiCaprio,  
Alanis Morissette,  
Tiger Woods  
Alicia Silverston,  
Peyton Manning,

Sarah Michelle Gellar  
Kobe Bryant,  
Brandy,  
Jennifer Love Hewitt  
Chelsea Clinton,  
Macauley Culkin,  
Christina Agilera  
Brittany Spears,  
Serena Williams,  
Anna Kournikova  
Jonny Lang

**Best way to communicate:**

Newsletter, Postcards, Website, E-mail

Newsletter is listed for all because everyone has a mailing address and will have access to the information.

*From GENERATIONS by Strauss & Howe and other resources*

- Pulse runs fast
- Bombarded by frequent images, in need of continual hits
- Remote control, constant change, focus is fragmented
- They have eaten from the tree of knowledge
- Live for now
- Jaded, having been there - done that
- Nothing shocks them
- Take consumerism for granted
- Cyber-suckled community
- Process information in narrative images
- Their 'BS' detectors are always ON
- Had everything handed to them
- Don't trust adults
- Want intimate relationships
- Like large groups
- Important religious issues:
  - Peer Ministry
  - Bells & Smells
  - Wesley Class Meeting
  - Prayer ministry

**Peers:**

High School Class of 2000

LeAnn Rimes,

Tara Lipinski,

Anna Paquin

Thora Birch,

Kirsten Dunst,

Kieran Culkin

Taylor Hanson,

Mila Kunis

Amelia Atwater-Rhodes

Jena Malone,

Jon Benet Ramsey

Mandy Moore

Zac Hanson,

Frankie Muniz,

Brendan Baker

Mary Kate Olsen, Ashley Olsen

Jessica McClure

Haley Joel Osment

Jake Lloyd

Jonathan Lipnicki

Elian Gonzalez

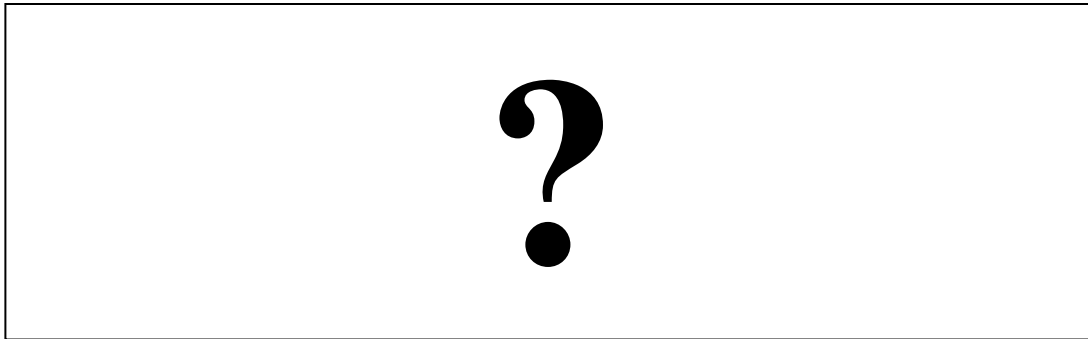
Myles Jeffrey

Kindergarten Class of 2000

**Best way to communicate:**

Newsletter, Website, E-mail, TXT Message

Newsletter is listed for all because everyone has a mailing address and will have access to the information.



**COMMUNICATING ACROSS THE GENERATION GAPS:  
Applying Generation Theory to Freemasonry's Future**

Reference List:

**GENERATIONS: The History of America's Future, 1584 to 2069**  
By William Strauss & Neil Howe  
Quill, William Morrow, New York

**13<sup>TH</sup> GENERATION: Abort, Retry, Ignore, Fail?**  
By Neil Howe & Bill Strauss  
Vintage Books, A Division of Random House, Inc., New York

**MILLENIALS RISING: The Next Great Generation**  
By Neil Howe & Bill Strauss  
Vintage Books, A Division of Random House, Inc., New York

**THE FOURTH TURNING: An American Prophecy**  
By William Strauss and Neil Howe  
Broadway Books, New York

Check out: [MAKING GOD REAL FOR A NEW GENERATION](#)  
By Craig Kenneth Miller and Maryjane Pierce Morton

*From GENERATIONS by Strauss & Howe and other resources*

Now run the **Length of Membership** report from *MDS* and enter the data into the table below:

Years	Number in Group	Percent in Group
0-9		
10-19		
20-29		
30-39		
40-49		
50-59		
60-69		
70-79		
80+		

An exit survey conducted by the Imperial Shrine of 16,000+ Shriners who had been members for more than 15 years showed that the primary reason for their decision to leave the organization was that they couldn't see a value in maintaining their membership.

- Use this data as a reference point, but for more detailed analysis and pairing of experienced members with newer members, run the **Age/Length of Membership Detail** report from *MDS*. This report will be very useful in establishing connection points that we'll discuss later.
- The relative level of experience of the members of your Valley will be useful in reviewing events to determine the size of potential experienced audiences to draw research comments from. It will give you a snap shot of how many members can remember "back in the day when" and the detail report will list the names of the members.

**Bring together a focus group from each of the generations identified in the first table. The make up of each of these groups should include members of varying tenure as found in the **Age/Length of Membership Detail** report.**

- These focus groups should meet independently of each other, but have the same basic questions:
  - What made you decide to become a SR Mason?
  - Why do you continue to be a SR Mason?
  - What other organizations do you belong to?
  - What benefits do you see from being a part of these other organizations?
  - What programs in the Valley do you attend?
  - What would it take to interest you in Valley activities?



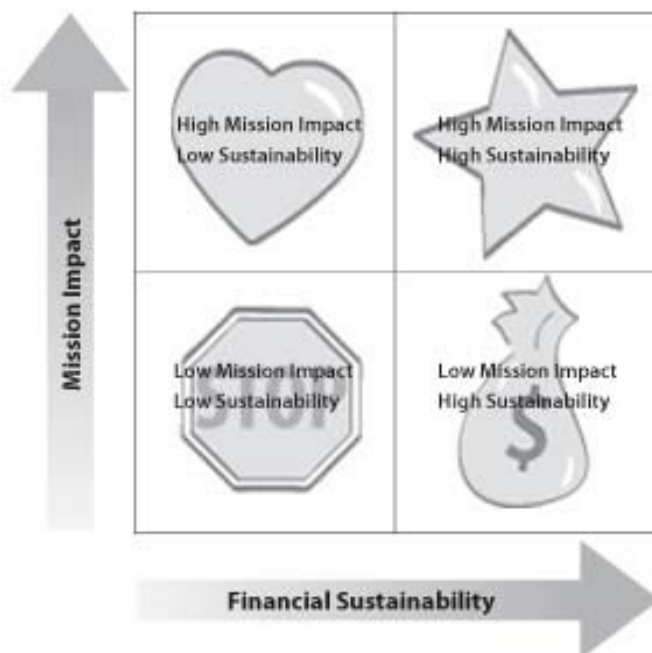
- If you were going to be talking to someone today about becoming a SR Mason, what would you say is the biggest reason why they should consider becoming a SR Mason?
- (Present each group with a calendar listing all of the events for a year in the Valley and copies of each event's promotion material.) For each event ask the following:
  - Is this an event that interests you and your friends? Why or why not?
  - How would you like to be informed of this event?
  - How would you like to register/pay for this event?
  - What about this event should be changed?
  - Is this event scheduled at the right time of the year? Why or why not?
  - What other community seasons should the Valley consider when planning events? (Soccer, baseball, hunting, etc.)
- The size of your focus groups is relative to the size of your Valley and to the number of members in each generational segment, however a few words of caution are needed about focus group operations:
  - Representation from each generation must be present in each focus group. See Section 2 "Assemble Your Team" from this manual for suggested generational weighting.
  - The future of the organization will be associated with making Scottish Rite Life attractive to the generations that have the longest time to affect change, bring in members, and lead the organization. This is not to say that any generation can be ignored, but if your Valley age and programming is geared towards retirement age and higher oriented individuals, you will not attract and maintain younger members. Even the youngest member is growing older every year. This is evident by the over 8,500 members lost to the Supreme Architect of the Universe this past year. It is therefore important that a balance must be achieved.
  - Focus groups produce the best data when moderated by a neutral party. These could be members of the Valley with a marketing, negotiation or mediation background, as well as members of the community who are not members of the Valley. Officers, 33rds, and Valley Secretaries are too close to the events and to Valley operations to allow for a truly open and honest exchange of information. If the Valley can afford to utilize the services of an outside source it would be very helpful.
    - Supreme Council has resource people that can aid the Valley in this process. Contact Dave Olmstead at Supreme Council for more information.
  - All comments from the focus groups should remain anonymous and be presented in an aggregate table as much as possible.
- Data collected should be disseminated to all members of the Scottish Rite Life team in sufficient time for them to review and be prepared for the next step in the process.

## 4. Event Review

Using the calendar, notes, and data from the focus groups you'll now work through every event in the Valley's arsenal to address each event's appropriateness using the following matrix:

- Adapted from Boston Consulting Group's well-known Growth-Share Matrix, this is a tool that you can apply *today* to an analysis of your Valley's programs. The matrix places *mission impact* on the x-axis and *financial sustainability* on the y-axis. The four quadrants are then labeled as follows:
  - STAR--High Mission Impact and High Sustainability: Keep and strengthen these activities.
  - HEART--High Mission Impact and Low Sustainability: Keep and build the sustainability of these activities.
  - MONEY SIGN--High Sustainability and Low Mission Impact: Keep and increase the mission impact of these activities.
  - STOP SIGN--Low Sustainability and Low Mission Impact; Close or transfer these activities.
- So, a program in the lower left corner has low mission impact and low financial sustainability--and is something you'll want to close down soon. Meanwhile, a program in the upper right corner has both high mission impact and high sustainability. That's a sure keeper. Simple though it is, the matrix can help bring clarity to some confusing situations.

### Dual Bottom-Line Matrix



- The important thing to consider when placing activities into the various quadrants, is that it is ok to be honest with yourself and with the organization. If there is an event that is not impacting the mission and is not sustainable, then it must be stopped as the icon suggests. On the other hand, if an event such as a reunion has a high mission impact and is financially challenged then efforts need to be focused on increasing the sustainability.
  - Increasing sustainability doesn't always mean charge more and offer less.
  - In fact it may mean offer more and don't charge more, by taking away costly items that no longer have a high mission impact.
- Changes in locations, scheduling, and other modes of operation inside individual events should be evaluated.

- Using the data from the focus groups and the age summary, evaluate each proposed new event against this dual Bottom Line Matrix. This will insure that it is worth taking the event from the brainstorming table to the task list.
- An example of an event organization and planning document that was developed by the Valley of Chicago can be found in the **Appendix B**. Use this example as a reference tool as you work through this process.
- Do all events have to be high impact and totally sustainable? The common sense answer is that this should always be the goal. Depending on the financial resources of your Valley, there will most likely be less manpower to support current mission critical events even if they are sustainable financially. As a result, even though an event looks like an event was worthy financially, you may find upon closer examination that the manpower cost wasn't worth it. Poor stewardship of the Rite's financial and manpower resources are inexcusable, and can be found among the reasons causing members to choose not to come back.

**Using the table in Appendix C, please list the events in the appropriate column (you may find later in this exercise that you move events from one column to another, so writing them in pencil may be prudent).**

- Congratulations, you have thus far accomplished some of the most difficult tasks of the process. Now that you've done it once, you will be better prepared to perform this exercise annually.

**As your Valley's membership ages every year, so do the events.**

- You don't see very many log splitting competitions on the schedule anymore and that's a good thing, but you don't find many computer training and self improvement classes being offered by Valleys either, and that's a bad thing.
- At this time review your focus group data again and discover what events they'd like to see that you're not offering. List those events on table in **Appendix D**.
- An annual program planning conference with the heads of all bodies is paramount to the success of your Valley in its development of a culture of inclusion.
- In the next section of this workbook, we will review the events that need to be fine tuned, and then we will examine the events that need to be replaced.

## 5. Event Tweaking

**So you've decided to keep some events. Good. Tradition is an important part of who we are and what we do, but it shouldn't be the guiding principle to our operations. We'll talk some more about that in the next section.**

- Let's take a universal event that exists in all Valleys and review it so that we have a commonality in the examples in this section.
  - Nearly all Valleys should have ranked the reunion as an event that has a High Mission Impact, but an event that wasn't completely self sustaining. Therefore it would have ended up in the "Heart" quadrant of the **Double Bottom Line Matrix**.
    - It is true that you could, and should, take this matrix and measure all aspects of the reunion to see what parts inside such a complex event should be tweaked. This is highly recommended, but for the sake of explanation here, we'll focus on a few aspects that happen in most reunions.
    - See the reunion section located in **Appendix E** where a list of specific reunion review areas is listed.
  - One of the things common to most Valleys is that there is a dinner at the end of the reunion. We will use this as our example of an event to tweak.
    - Thinking of the five generations that are represented in most Valleys the following narrative shows the view point from each generational viewpoint:
      - **G.I. Generation** values tradition, established patterns, and is looking for a 'classy' event.
      - **Silent Generation** wants to see what the majority thinks, maybe do a survey. They want to be sure to fit in.
      - **Boomer Generation** is looking for and expecting something that communicates meaning, values, and purpose.
      - **"Gen X" Generation** is independent and pragmatic. If there is going to be any program at all, it better be relational and rousing.
      - **Millennial Generation** needs things to move along quickly and is interested in high energy narrative images.
    - So how could you make the dinner more appealing across the generations?
      - **G.I. Generation:** "Isn't it OK as it is?" But do keep it relatively short, and assist with transportation and logistics.
      - **Silent Generation:** "Let's recognize the milestone classes."
        - 25 years – the Fall Class of 1981

- 50 years – the Fall Class of 1956
  - 60 years – the Fall Class of 1946, etc.
- **Boomer Generation:** “We should have a brief, motivating presenter speak on an inspirational, values based topic that relates to me.”
  - **“Gen X” Generation:** “I’ve got other things to get to. Include what you need to do at other meals during the reunion. Let the closing of the 32<sup>nd</sup> Degree be the close of the reunion.”
  - **Millennial Generation:** “We need a high energy DVD presentation on the Scottish Rite, or, even better, on one of the charities or outreach style programs with first person, personal stories and quotes.”
- **Is it that simple? Yes, a few little changes can make a big difference if you, your team, and the leadership of your Valley are committed to it.**
  - **Things to consider in the tweaking of your events:**
    - Is the event scheduled at the best time?
    - Does the event need to be moved to rotational list events which allow the event to occur less frequently?
    - Can the event be included with other events?
    - Are there similar events being offered by other groups that may decrease attendance or that may make delivering a unique experience cost prohibitive?
    - Does the Valley have enough members in the target audience age range to sustain the event?
      - What could be changed in the event to make it more multi-generational?
    - Are the volunteer teams running these events structured in a manner where they will generate their own manpower over time, or will it be a staff driven event forever?

## 6. Event Retirement

Looking at your list in Appendix C, let's talk about the events that fell into the Stop Sign or Dollar Sign quadrants.

- To begin with, many of these events should present you with the easiest decision in this entire process. If an event was evaluated and ended up in the Stop Sign quadrant, then as stewards of the resources of the Rite you have no choice, but to eliminate this event.
  - Does this mean that the event never had value? No! In fact, in its day it may have been a tremendous event, but today it is no longer practical to maintain.
    - It is rather amusing if you think about this. Consider the fact that today we would all agree that driving cross country in a horse and wagon would not be a prudent method if we needed to get there in a hurry. However, this does not mean that the horse and wagon were never a good means of transportation.
    - In the day of jet travel, bullet trains, and even video conferencing which may eliminate the need to physically be in front of a client, the thought of spending months to traverse our country is laughable, but some how removing a worn out event from a calendar is not?
  - There may be some historical purposes from these events that you may want to hang on to, but be careful not to enshrine them to the point that they take on a life of their own, as an idol to be paraded at every event to remember the "Good Ole Days."
    - Tradition is a vital part of any organization and particularly one as old as ours.
    - Tradition however does not have to be the reason why an event or practice which has become a stewardship issue is maintained.
      - We have all heard the story of the new bride who was being shown how to cook by her in-laws. After asking why they cut the end of the turkey off, she learned "because Grandma always did it that way." Being an inquisitive sort she asked Grandma herself. Grandma's answer was, "my roaster was too small and I could only fit a small turkey into it."
      - Traditions get started somewhere in time for a specific reason. Your job is to make sure it wasn't simply because the roasting pan was too small before you perpetuate the practice.
- The latter of these two requirements is a more difficult situation, since these events are sustaining themselves financially, but do not have a high mission impact.
  - One of the costs that needs to be evaluated and is often overlooked on the budget sheet, is the volunteer and staff manpower required to pull the event off.
    - Don't be fooled just because the income stream seems to cover the out of pocket costs. There are other costs to evaluate:

- How much time did the office staff spend on this event that kept them from completing other mission critical tasks?
  - How many volunteer meetings were required to get this event up and going?
  - How many phone calls and emails did you handle regarding this event?
- So now the issue becomes, what could be added to the event that could make it more mission critical and generate a return on the investment of everyone's time?
- Since the event is self sustaining, if you can tweak an event in this quadrant you'll be farther ahead, simply because the event already has an audience and the beginnings of some traditions that are worth keeping.
  - Be cautious not to remove the elements that are drawing the paying customers into the event.

## 7. Planning for the Big One

What is a “Big One” in your Valley?

- It doesn't matter how many members your Valley has or how much the Valley has to put behind this project.
- A “Big One” is an event that is efficient, purposeful, and on target.

So far, between your Stop Sign quadrant and your Dollar Sign quadrant you've eliminated some events from your schedule. Now you are ready to start looking at new events. So what will it be? Before we attempt to give you some ideas of what it could be, let's look at **how** it should be.

- How it should be is a very important and often overlooked item in the early stages of planning for an event.
  - Your goal should be for every person who attends the event to feel welcome and cared for. That sounds pretty obvious doesn't it? Now, let's look at some of the details that will make the difference.
    - Does the invitation answer all of the questions?
      - Who, what, when, where, what to wear, etc.
      - Does it say how/when to register?
    - Are there attendees at the front door welcoming people and helping them in through the door?
      - Do you have a supply of umbrellas that can be used to escort people in when it's raining?
      - Are the attendees at the door familiar with the schedule and location of events, in order to share this information with those entering? And are they greeting everyone with a smile and a “Hello! How are you today? Thanks for coming.”?
    - Are the lights on in the bathrooms, hallways, display cases, and other areas where visitors might want to go?
    - If you have a registration table, are the friendliest and most customer oriented people staffing it?
      - Do they have a print out of all registrations?
      - Have they been supplied with other useful items, such as large print name tags?
        - Our wonderful engraved name tags work well to identify the fact that we've been around long enough to desire a wonderfully engraved name tag, but from a distance with aging eyes they are almost useless.



- Greeters and registration people should have name tags that list their first name large enough so that a person walking up on them can read it from at least 6' away.
- Is there nice light welcoming music playing to help set the mood?
- Is there a program or schedule of events that outlines the event timeline?
  - Does it thank the person for attending the event?
  - Is it printed in a readable type?
- Does the atmosphere of the event scream quality, organization, and welcoming feelings?
- There are many more “how” things to look at, but for the sake of your time and print space, we have only mentioned a few of the basics. A good rule of thumb would be that you should plan the how side of your event much like a concierge service at a fine hotel plans for their guests.
  - There is no such thing as “just a member”. If a person enters your Valley’s event he/she is either a volunteer staff member (which requires a whole different level of service which we’ll address later) or they are a guest.
  - If that person chose to come to this event, they are a guest. There should be no difference in the treatment of members from young to old, degree to degree, or if they’ve ever held a gavel. A dues paying member is exactly that. He is a **member** of the Valley and therefore our brother who we will treat as family.
    - While appropriate Masonic courtesy should be afforded to those members of who have achieved various positions within our fraternity, it is imperative that we remember that all members are shareholders in the Rite and therefore need to be extended the same fraternal respect.
- **The “Golden Rule” is a great event planning guide- Do unto others as you would have others do unto you.**
- Every new event in your Valley should take into consideration the table in section 3 of this workbook regarding the age breakdown of your Valley’s membership.
- A wise event planner would take members of the focus groups and investigate their interest, willingness, and ability to be a part of producing events for their age group. Members from each focus group could also be combined to work on multi-generational events.
- There should be a balance in your Valley’s schedule of events that offer specific generational activities and other multi-generational events.
  - Do not fool yourself into thinking that you can make every event multi-generational and get away it. The members have different needs and therefore you’ll need to develop different events.

- If you have questions about whether or not an idea for event is appealing to the target audience, utilize an email list or members of your focus groups to garner feedback before committing to putting the event together.
- What is the big event, the capstone, the hallmark event of the year for your Valley? Is it a baseball game, a family picnic, or should it be something that makes the community say, “who is that and how I do I become a part of that?”
- It is possible to produce an event that provides a service to the membership and at the same time brings in members of the community.
  - The self improvement industry is a multi-billion dollar a year industry. Our members as well as community members at large, contribute to the bottom line of this industry each and every time they buy a new “How to Succeed” book or attend a seminar. Should your Valley host a series of seminars?
    - Investigate the costs associated with bringing in a professional speaker and even charging admission. If the speaker is of the correct caliber, you may be surprised at what people will pay for an intimate training session.
    - If you want to start on a smaller scale, take a look at your valley membership or other trainers in the Masonic community whose fees might be absorbable.
    - Do not invite the community to hear a non-expert presenting material that he “sort of knows.” Remember that this could be the first and only impression that you will make on these guests.
  - Maybe your Valley can build 20 houses in your parking lot using community volunteers. It’s been done with a base organization size of less than 1,300.
    - Collaboration with other community agencies produced a grassroots movement of volunteers and resources for a one day event on April 1, 2006 in Milford, Ohio.
    - Contact Dave Olmstead at for more details on this particular project.
- The key to creating an event with a measurable magnitude which will garner attention from the community is to have a hook or a draw that is unique and reproducible year after year.
  - Does your community have a special fireworks display and a unique vantage point for viewing, which would enable a group to enjoy dinner and fellowship before the fireworks?
    - The local Boy Scout Council in Cincinnati Ohio hosts a dinner, which also is a fundraiser, on a parking lot atop a hill the night of the big downtown fireworks. The hook includes:
      - Parking in a controlled lot with shuttle bus service to the dinner
      - A great view
      - Great food

- Cash bar
  - Silent auction of sports memorabilia and a Lexus
  - Supervised children’s area with age appropriate activities
  - The event has been going on for 15 years.
- Valley of Chicago(?) has hosted a river cruise during the Air and Sea show.
    - Great food
    - Great view
    - Cash bar
  - The fireworks in themselves are an event that a member could choose to go view on his own. These organizations have created another event around the already existing community event, without the cost of the “big ticket” item.
- Does your community have a sports team with which you may be able to create events?
    - We’ll talk more about free events in the next section, but booster type gatherings and tailgating activities are good fellowship events that can be multi-generational.
    - Does your Valley have a room where you can show the big game on a big screen TV or project it on a screen?

## 8. No or Low Cost Events

**There is a misconception that is present in a lot of Valleys and that is that all events have to be paid for or at least subsidized by the Valley.**

- While there may be some phone/email time involved to help get small networking groups up and running, there really should not be a drain on the Valley budget.
- Networking is an important part of today's business culture and should be embraced in the Valley. This can be as simple as aligning members with similar vocations.
  - A simple interest and vocational survey can be used, perhaps at your next gathering or available on your web site. See **Appendix F**.
  - People of similar vocations can choose to have their names sent to each other as a mentoring group or collaborate together to provide guidance to other members seeking services.
  - Members with similar hobbies and leisure activities could also be sent each other's contact information.
    - Can you imagine hosting a model railroad club, ham radio club, car enthusiasts club in your temple?
    - Better yet can you imagine these groups getting together in their communities on their own because they made a connection through the Scottish Rite? It is possible and it is what some members are looking for.
- What about D.O.T. or Dining Out Together?
  - Encourage people to gather at lunch once a week at locations close to where a group work and have lunch together.
    - Case in point- Members of Phoenix Lodge in Perrysburg Ohio started meeting once a week at a local restaurant, and as the group grew members from around the 11<sup>th</sup> Masonic District would stop by just to say hi.
    - The group is such a regular feature in the restaurant that the waitress knows what type of soda each drinks and who will have a salad with their meal.
    - Those in attendance range from a junior in college to retirees, each members of the Lodge enjoying Masonic Fraternity.
    - The agenda for each lunch session- good times and getting to know each other- no more, no less.
- What about new members? If your Valley is bringing in less than 100 members in a reunion then the members of that class ought to be the best known brothers in the Valley.
  - If you think back to the class sizes of 250 candidates, it is a challenge for an organization to assimilate and connect with that many new members in one day.

- Now reflect back to the last reunion in your Valley. What would happen if information about each member of the class was shared with gregarious members of your Valley, who would then invite these new members to join them for lunch on several occasions after the reunion? Would that new member feel important? Would that new member feel as if they were included and welcomed into the Valley?
- What about offering movie night for the kids and a Pampered Chef party for Mom while Dad is in a meeting or a degree practice?

## 9. Customer Service in Day to Day Operations

### Part 1- The phone system:

- One of the most frustrating aspects of doing business today is indeed the dreaded labyrinth that is included in the modern phone system. Here's an example taken from vocalabs.com April 3, 2006:

#### **The Customer Service Survey: Top Ten Most Annoying Recorded Messages**

**10. "Please listen carefully, as our menu options have changed."**

This would be okay for a day or two after the menu options actually change, but after six months?

**9. "You may get faster service on our website [www.wedontwanttotalktoyou.com](http://www.wedontwanttotalktoyou.com)."**

If I could get what I wanted on your website, don't you think I'd be going there instead of listening to this annoying recording?

**8. "Hi! My name is Suzy, your automated virtual assistant!"**

The last thing I need is a computer which wants to be my friend.

**7. "I'm sorry, that's not a valid option." (in response to hitting zero)**

This may be arrogance, but I think I know better than the computer when I need to talk to a live agent.

**6. "In order to help us serve you better..."**

This message is invariably followed by asking me to jump over some obnoxious customer-hostile hurdle.

**5. "Please press or say one."**

All the power and flexibility of touch-tones, combined with the accuracy of speech recognition!

**4. Any advertisement played while on hold for technical support.**

Here's a clue for the marketing department: If I'm on hold for technical support, chances are I'm not a happy camper. This is not the best time in the world to try to sell me something else.

**3. "Your call is very important to us."**

A statement which is immediately proven false.

**2. "We are experiencing unusually high call volumes."**

Like #10, this would be OK during those occasional moments when a company really is flooded with calls. But after a month you don't have a call-volume problem, you've got a too-cheap-to-hire-enough-agents problem.

**1. "Please enter your account number" said by the recorded message, followed by "Can I have your account number?" from a customer service representative.**

There's this amazing new invention called a "computer" which lets you do things like "store" and "communicate" stuff called "data." These "computers" can solve all sorts of irritating little problems, but only when they're used properly.

- We have all experienced this frustration with phone service, most likely too many times to mention. In order to evaluate your own phone service, consider listening to your message from a different point of view.
  - Ask your neighbor or any other non-member to call in and navigate the system to your phone without giving them the direct dial extension, and then ask them the following questions:
    - How easy was it for you to navigate the menus to reach me?
    - How long did it take you to get to me after the system first picked up the call?
    - Did our titles make sense to you?
    - Did you give up and try to dial 0 at any time to attempt to bypass the system?
  - Now ask at least two different members to do the same thing.
    - One member should be an older member
    - One member should be a younger member.
  - The results from these three listeners should give you an indication of areas that you can review and improve.

## Part 2- Office Help

- Regardless of whether your Valley has chosen to have the phones answered by a live office staff person or by an automated phone system, there will be a time where direct contact on the part of the office staff will occur.
  - This is undoubtedly one of, if not the most important connection point with our members. The ladies and gentlemen behind the counter, desk, or window are “the Valley” in the eyes of the member who calls or stops in. Just as the person behind the counter, desk, window, or on the phone at any other organization is “the store”, “the city”, and of course everyone’s favorite “those morons at tech support”.
    - Ken Blanchard and Sheldon Bowles write about a different form of customer service. In their book Raving Fans they highlight the values of creating customers who are so enthusiastic about your customer service that they tell others. Try these three steps:
      - **Decide what you want.**
        - Establish what the vision of your company's relationship with your customers should be. This gives you a framework within which to target customers, creating a picture to fit customer comments and requests as you receive them, and forming limits on your business as you talk with customers.

- **Discover what the customer wants.**
  - Discover what the customer is thinking. If necessary, alter your initial vision.
- **Deliver the vision plus 1 percent.**
  - Customer needs are rarely static. If you want raving fans, you need to consistently deliver better and better service. Improve 1 percent per week and, within a year, your service will be more than 50 percent better.
  - "Your customers are only satisfied because their expectations are so low and because no one else is doing better. Just having satisfied customers isn't good enough anymore. If you really want a booming business, you have to create Raving Fans."
- Every aspect of how your Valley handles a member is very important in that member's decision to renew his membership each year.
  - If you think of a member who is not on a degree cast, the stage crew, and not an officer, what is his connection with the Valley?
    - If this same member only attends one reunion a year and one other event, that gives you a very narrow margin to connect with this member and make him appreciate his membership.
    - If at one of these connection points he has a need that is not met, you have increased the likelihood that he will decide not to maintain his membership when you send him his dues notice.
- Again, test yourself and your Valley. Offer a couple of unfamiliar members a free lunch if they will call and come by the office anonymously to test the systems you have put in place. (See invitation letter and response form in **Appendix G**)
  - Sounds kind of scary? It shouldn't be. Here is a chance for you to add value to a couple of member's membership by asking them to contribute to the quality of their Valley's operations, and at the same time to enjoy a lunch and a chance for some Masonic fellowship.
  - Can you take this test once and be off the hook? No! You need to make this a quarterly process.

### **Part- 3 Using Volunteers**

- In the brief moments that it takes for a member to walk up to a table and say, "I seem to have misplaced my dues card, can I still come into the reunion?", the entire image of your Valley will be carved in stone in that member's mind.



- Let's face it, not all of our members are the super friendly gregarious type that we would hope to approach if we were the one who forgot our dues card. So why do we place just anyone at the registration tables for our reunions and other events?
  - We attempt to find the best speakers for the various degree parts and someone with an accounting background for the treasurer, but often times any warm body will do for registration. Find the friendliest, most outgoing personality in your Valley capable of performing this duty, and let him be the "face" of the organization at your events.
- Volunteers have to be recruited, screened, and trained. Cast your vision about how you would expect situations like this and others to be handled.
  - Do your vision casting and training several days before the event. If you wait until 10 minutes before the doors open, you will make this task a most difficult one for your volunteer to be successful with, and will risk leaving a bad impression on the membership even before the event begins.

## 10. Data Entry and Maintenance

**Does the manner in which we enter the personal data of a member have anything to do with the quality of our members' experiences? You could say that it could be the difference between life and death.**

- In a membership based organization like ours the more data we can collect about our paying customers, who are the members, the better our ability will be to provide services that will meet their needs.
  - Knowing whether or not a member is still alive is a very important issue for every Valley. There will be occasions when we are not aware a member has passed away, and that situation will be addressed in greater detail in the following section, "Planning for Widows and Orphans, Even Before They Are". One of the worst and often most embarrassing phone calls we receive is a request from a widow to stop sending dues cards because her husband passed away some years ago.
  - If we were to enter as much of the personal information about our members as we were able to obtain, so that we knew when a birthday was going to occur, what the spouse's name is, or for that matter, what they did for work or enjoyment, would any of this really be important ?
    - Knowing this level of information as you are having a conversation with a brother or calling his house should be the standard we set as a fraternal organization.
    - We should be better equipped and know more about our members than the other organizations who are calling on our members to sell them lawn furniture.
- If you use a shopper card in your weekly purchases at your local gas station or grocery store, you are allowing that commercial enterprise to develop a profile based on your spending habits and credit information.
- Do you know which members attend which events and to what frequency?
  - A simple spreadsheet including the member's name and columns for every time that a particular event has been held allows you to track individual attendance, and will provide you with a way to "double-back" and check the age of your audience for the event.
  - For the more advanced computer users, the development of a database with live tables is certainly an option.
  - Being aware and familiar with what your members are doing is most important to your Valley delivering the appropriate programs to the appropriate audiences.

**Yes, data entry takes time. In the days when 250 or more candidates in a class and maximum capacity at all events was common place this data entry might seem to have been superfluous, but today that is not the case.**

- Today, how we serve our members is more important than ever. Our existing members can become our Raving Fans and in can instantly become the largest Membership Committee ever developed.

- The lessened workload in the modern paper-less office and the shorter work weeks due to the efficiency of technology, have not necessarily panned out as the forecasters predicted. Many of these tasks have become easier, but additional responsibilities have been added, which have most generally resulted in a larger workload for the individual. We have to realize that this is common place in our society today, and learn to budget our time in a manner which will best accommodate our needs.
- The facts are, in this data-centric society of today, everything is customizable and in most cases driven by the personal preference of the end user.
  - You can change the ring-tones on your phone, you can forward your phone to another phone, and you can even drive around in a 4-wheeled leather clad interior phone thanks to OnStar.
  - Depending on what products you buy at the grocery store, you will receive different coupons from the printer at the cash register.
  - So if all of these personal data driven experiences are being utilized by our members, why are we not offering options where we can?
    - Would your members prefer to receive the Valley newsletter electronically in a PDF?
    - Would your members like to register for events online?
- If your Valley is using the excuse that “our office staff can’t work any harder and therefore we don’t have the time to key in all of that data,” let’s consider this:
  - For decades the national average for keyboard data entry has been about 12,000 keystrokes per hour. Anything less is unacceptable to organizations concerned about costs. Superior operators can key at more than 50 percent above the average rate, or about 18,000 keystrokes per hour. (findarticles.com)
  - Currently, the size of our reunion classes is getting smaller, resulting in significantly less data to enter than in previous years. The present is the opportune time to begin entering this data and training our employees with the idea that this is the expectation for future classes.
    - If at all possible it would be advantageous to bring in volunteers or interns to aid in adding data into existing member’s records. This data could be from either their original petitions or from the Member Career and Interest Survey form found in **Appendix F**.

# 11. Planning For Widows and Orphans, Even Before They Are

**We have pledged to support our brothers, their widows, and their orphans, but do we have to wait until they are widows and orphans?**

- One of the many differences between our organization and others, is the pledge to support each other's family in times of extreme need, but does it always have to be extreme?
  - We could follow the example of other organizations and couple quality spouse programming and quality supervised childcare with some of our existing meetings.
  - Realize in your programming, there is a huge difference between a quality ladies program and inviting the ladies to lunch on the Saturday of the reunion.
    - There have been instances of the ladies being sent an "invitation" stating that their role in the ladies auxiliary is...
      - Find a way to allow the ladies to define their own role in the organization, and allow them to help in the programming.
    - Recognize that today most families are two income families. Understand that the spouse's time is as equally as important as that of the member, and strive to provide quality programming that is suitable for the spouse to attend.
      - Could that mean you will need to pull together a focus group of spouses? Yes, see you are catching on!
      - The more input you receive prior to starting a program, the better the program will be.
  - Now if you have both the husband and wife coming to concurrent events, what about the children?
    - One of the easiest ways to learn about putting together a successful childcare program in your Valley, is to visit the childcare program of a large contemporary church or an after school program in your area, and to meet with the director of the childcare program.
      - Several of the areas that you will want to look at in their programs are:
        - Building safety
        - Emergency plans
        - Cleaning standards
        - Volunteer training
      - A core group of people will be required to get this program started. This program could provide great prospects for community development. By bringing people into

this program, you will create an opportunity for them to make new connections and to add to the value of their membership.

- Once again, a focus group of members and spouses should be brought together to develop the steering committee for this support function.
- Include in your considerations that this should be a multi-age program that ranges in support from babies through elementary school aged children.

**Our members who have passed away create an opportunity for us to give our attention to deserving widows.**

- Unfortunately, due to the current average age of the membership of many of our Valleys, this sector could demand a very large part of the support work that your Valley does.
  - Consider developing a team of people with the responsibility to contact periodically those members who have reached a certain age. Speak with them about things in general and then ask them if they have any needs or concerns with which the Valley and/or the membership may help them.
    - These actions will benefit the Valley since it will be recognized as being proactive and interested in helping its members.
    - You may also benefit from these actions with a more timely death notification if the family knows that the Valley is involved with the family member.
  - Once you know of the death of a member does a 12 month clock start running?
    - In some instances, policies are in place that says the widow of a member receives the newsletter for 12 months and then she is removed from the list.
      - When learning of the death of a member, wait a short period and then contact the widow, and offer to keep her on the mailing list. At the same time, remind her of the special programs which the Valley may have planned or in place with which she may become involved. Interest in our programs by the spouse after a member's death will vary greatly, and you need to be aware of the specific desires of each and every case, in order to act accordingly. Be sure to include these items as part of your record keeping process.

# Enrichment Accountability

## Enrichment: Converting members into committed members

### 1. Valley programming is interest and need driven

- a. Develop multi generational and targeted generational events
- b. Develop targeted need/interest events
- c. Develop events targeted to familial status
- d. Year 1 measurement includes the aggregate attendance compared to the previous aggregate of all Valley before targeted event development
- e. Year 2 measurement of each event includes increased participation of targeted audience

### 2. Value of each program in concept

- a. Using the Double Bottom Line matrix as outlined in the Scottish Rite Life add up all of the events on your Valley schedule and fill in the blanks below:

- i. Star events \_\_\_\_\_%
- ii. Heart events \_\_\_\_\_%
- iii. Dollar sign events \_\_\_\_\_%
- iv. Stop sign events \_\_\_\_\_%

- b. Year 2- Increase in Star and Heart events

### 3. Quality of each program in execution

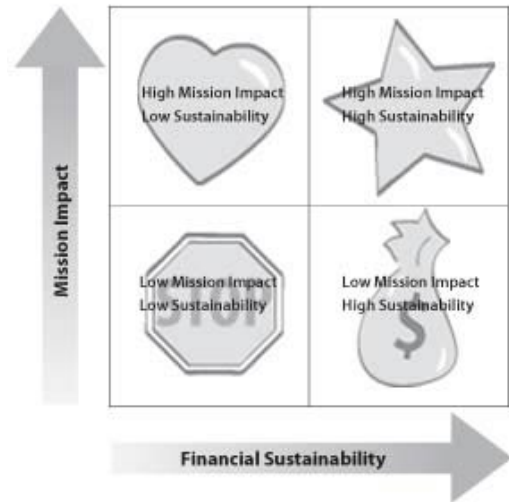
- a. Using the Double Bottom Line matrix as outlined in the Scottish Rite Life Review and review the execution all of the events on your Valley schedule and fill in the blanks below:

- i. Star events \_\_\_\_\_%
- ii. Heart events \_\_\_\_\_%
- iii. Dollar sign events \_\_\_\_\_%
- iv. Stop sign events \_\_\_\_\_%

- b. Year 2- Increase in Star and Heart events

- c. If any event with Stop Sign is to continue, outline the action plan required to correct and move this event into the Heart or Star quadrants.
- d. If you are going to stop a program what is the exit strategy in place to eliminate financial or emotional risk to the Valley?

Dual Bottom-Line Matrix



**Notes:**

# Enrichment Appendix