**LODGE FIVE YEAR PLAN TEMPLATE**

Lodge Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Compiled by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**This document provides a suggested template to assist Lodges in developing a ‘Five Year Plan’.**

**It’s purpose is to set out the objectives and timescales for Lodge initiatives aimed at developing and maintaining a healthy ‘masonic environment’ in which members can enjoy their Masonry, in the full knowledge that the Lodge has a secure plan for it’s future.**

**It is important that all Lodges create an environment within which members are made to feel welcome and have confidence that senior members of the Lodge understand and take into account their Masonic aspirations.**

The template is designed to encourage discussion over a number of areas which may previously have been left to chance and to remind brethren that the Lodge is constantly changing and needs to be managed in a planned manner in order to thrive.

It is suggested that a small committee is formed, chaired by the WM and including Lodge Wardens in order to create a draft plan for discussion at the Lodge GP meeting.

The Five Year Plan is ‘dynamic’ but should be reviewed at least annually; preferably towards the end of the Masonic Season.

**Section 1 – Succession Planning**

*It is important that brethren are given the opportunity to occupy both progressive and non-progressive Offices. Non-progressive Officers (Secretary, Treasurer, DC, Charity Steward etc.) may be expected to relinquish their roles after 3 – 5 years in order to make way for others. Consideration may be given to the allocation of a ‘training period’ for at least one year leading up to the change in Office so that the newly appointed brother is given the required knowledge and experience before taking on his new role.*

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| **YEAR:** |  |  |  |  |  |
| **WM:** |  |  |  |  |  |
| **SW:** |  |  |  |  |  |
| **JW:** |  |  |  |  |  |
| **Secretary** |  |  |  |  |  |
| **Assist Sec** |  |  |  |  |  |
| **Treasurer** |  |  |  |  |  |
| **DC** |  |  |  |  |  |
| **ADC** |  |  |  |  |  |
| **SD** |  |  |  |  |  |
| **JD** |  |  |  |  |  |
| **IG** |  |  |  |  |  |
| **Charity Steward** |  |  |  |  |  |
| **Mentor** |  |  |  |  |  |
| **Almoner** |  |  |  |  |  |
| **Chaplain** |  |  |  |  |  |
| **Tyler** |  |  |  |  |  |

**Notes re Succesion Planning:** *This may include a list of brethren identified to ‘shadow’ Lodge Officers should they be unable to attend Lodge meetings; Stewards may be ideal candidates to shadow the Deacons/Inner Guard****:***

**Ceremonies Planned:**

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| **Date of Meeting** | **Ceremony / Event Planned** |
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**Section 2 – Recruitment, Retention and Re-engagement**

*The Lodge is encouraged to appoint a ‘Membership Officer’ (not the Lodge Secretary, as he already has enough to do). This is an unofficial position that may be undertaken by any member of the Lodge, the purpose of which is to identify a specific Brother dedicated to ensuring that emphasis is given to the areas of Recruitment, Retention and Re-engagement of Lodge members.*

1. **Name of Lodge Membership Officer:**
2. **Lodge Recruitment:** *What actions will be taken to ensure that a healthy pipeline of initiates is in place in order to guarantee the future health of the Lodge? This may include social events, intro by members, white tables, dine a friend evenings, involvement in Area initiatives/activities etc.*
3. **Lodge Retention:** *What actions will be taken to ensure that members remain committed and supportive of the Lodge; e.g., Personal Mentors, Buddies appointed for all new members, ascertaining the wishes and aspirations of Members with a view to their being included, if they wish, in the Succession Plan*

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1. **Lodge Re-Engagement** *What actions will be taken to ensure members who have been absent from the lodge are contacted and encouraged to attend, who will carry out this work and under what timescales e.g. Buddies could be appointed to make contact with members who no longer attend, offer to accompany them to the Lodge, look after them in the Lodge; some brethren, particularly newer brethren may be emabarrassed to attend after a period of absence because they have forgotten the processes or signs. It may also be the case that the brother has financial difficulties – is there anything the Lodge can do to help?*
2. **Lodge Mentoring** *What actions will the Lodge Mentor take to ensure that brethren, new and old, receive the support they need in understanding their specific offices, roles and Freemasonry in general?*
3. **Planned Social Events**

*These may be social events purely for the enjoyment of the members, specific ‘thank you’ evenings (e.g., Ladies Nights), or recruitment events, either Lodge Specific or as part of a Centre / Area organised initiative. You may also wish to include events linked to the forthcoming anniversary celebrations:*

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| --- | --- | --- |
| **Event** | **Planned Date** | **Reason for Event** |
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**Section 3 – social media and Communication**

1. **Name of the brother who will be responsible for the Lodge social media:**

**Assisted by:**

1. **Social Media:** *What is the Lodge plan for developing its own Social Media sites – web page, Facebook, Twitter etc. and how will this link into the Area and/or Provincial sites? How will members be encouraged to engage with social media?*
2. **Lodge Communications Policy**

*How will the Lodge communicate with the brethren? This may include email as a main communications tool, via Facebook or by mail. Is the Lodge Summons emailed to members or posted, are certain reports (e.g., Charity Steward’s Report) emailed to brethren in advance to save time at Lodge meetings etc.*

1. **Other Areas** *(are there any other areas which are important to the Lodge to be included in this plan?)*