

## Road Map for Improvement

**“The 24 inch gauge is used by operative masons to measure and lay out their work.”**

This **Road Map for Improvement** has been developed to assist Officers in articulating what is important to their Lodge by evaluating their success in several areas, i.e. member programs, community involvement, attendance, leadership, etc. The Road Map will also help identify areas for improvement and areas that are important to maintain. What follows is a discussion tool intended to be used to identify the Lodge’s values. There are several headings followed by several topics that you will rate from 1 to 4. Your Lodge may be strong in some areas and weak in others. This is normal. No Lodge is perfect at everything. It is not expected that every Lodge is a ‘4’ in each area and a score of ‘0’ is not considered a failure. This evaluation is meant to serve as an internal measure of your Lodge’s current status in order to help you prioritize the areas on which you would like to improve.

When considering areas to improve or maintain, a Lodge’s values must also be taken into consideration. For some Lodges, maintaining a ‘4’ in one area or improving from a ‘2’ to a ‘3’ in another area may be more important than fixing an area in which you score yourself a ‘0.’ Honesty is critical when completing this document. As this is an internal tool, any dishonesty is really an attempt to deceive you. It is difficult to make improvements in too many areas at once, so it is best to focus on just two or three areas each year. This tool is intended to help you decide on which areas to focus.

This assessment is being shared with your DEO simply so he can best help you meet your goals. The data is collected to help Grand Lodge identify opportunities to better assist and serve the Lodges. This is NOT a graded exercise. The Grand Lodge will not punish or reward Lodges based on their responses. Completion is required of each Lodge, but the results of the Road Map will not be used directly in the inspection of the Lodge.

***Completion of this form is the responsibility of the Worshipful Master and the Lodge Education Officer.*** They should complete this along with their assigned District Education Officer. Including input from the Officers of the Lodge is strongly encouraged. They may also include Past Masters or the elder statesmen of the Lodge, as they wish. This can be done at an officer’s meeting or even as an Education Program for the entire Lodge (when no guests are present with the exception of the assigned DEO).

**This Self-Improvement Tool should be presented to the DEO electronically prior to the Lodge’s inspection.**

***“Opportunity for distinction lies in doing ordinary things extraordinarily well.” Bernice Abicht***

***“Without continual growth and progress, such words as improvement, achievement, and success have no meaning.”  
Benjamin Franklin***

Lodge Name \_\_\_\_\_ # \_\_\_\_\_ DEO Assigned \_\_\_\_\_

## What Does This Lodge Value?

Out of many backgrounds and experiences comes one Masonic Fraternity. No two Lodges are the same, nor should they be. One of the great things about Freemasonry is its diversity; therefore, there are many recipes for a successful Lodge. While Masonic Lodges everywhere share a core set of functions, the reality is that Masonic Lodges, by necessity, will place a higher priority on some more than on others. Look at the list of suggested Lodge functions below and think about your Lodge. **Which are the most important to your Lodge? Where does the Lodge spend its time and energy? What is your Lodge known for? What do they value most?** Since each individual Lodge, like each individual person, lives by their own core values, there are no right or wrong answers to these questions.

Using the list below as a guide (but feel free to include others that may not be on the list), identify the five or six that your Lodge considers to be the most important. All of these are important; but which are the most important to your Lodge? It is okay if ‘Ritual’ or ‘Gaining New Members’ are not included in the Lodge’s top five or six. There are other functions of a Lodge that are important and lead to a successful Lodge.

Once you have identified your Lodge’s top five or six, rank them from most important to least important. Record your Lodge’s top three in the space below. Again, all of these are important, but this tool is attempting to help your Lodge identify what it holds as its most valuable traits. Understanding the Lodge’s top three will guide discussion and help the Lodge decide where it would like to focus its energy in this coming year.

The list below includes suggestions and should not be considered comprehensive or exhaustive.

Ritual Excellence	Brotherhood and Fellowship	Relationship With Our Community/Community Activities
Relationship With Other Lodges	Brotherhood and Fellowship Outside Lodge	Relationship with Widows, Orphans, and Infirm Brethren
Lodge Education	Mentoring New Officers	Lodge Experience: Candidate Integration, Meetings, Activities
Gaining New Members	Retaining Members	Attendance at Lodge Meetings and Functions
Relationship With Youth Groups	Contributions to Charity	Lodge Tradition or History

1.

2.

3.

*“It is time to put our values into action, not to gain members or to earn an award; but because that is what Freemasons do.”*  
*Jess N. Raines*

**Community Involvement**

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Community Service Activities</b>	The Lodge and/or its members do not participate in any Community Activities.	Some of the Lodge members participate in Community Activities on their own.	The Lodge and its members participate in one or two Community Activities per year.	The Lodge and its members participate in several Community Activities throughout year and look for ways to participate and make a positive impact in their community.	
<b>Lodge Activities engaging Community</b>	The Lodge holds no activities to which community members are invited.	The Lodge holds one activity per year to which community is welcomed.	The Lodge holds two or more activities per year to which community is invited.	The Lodge sees itself as an important part of the community and is always looking for opportunities to invite community members into the Lodge.	

**Member programs/activities**

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b><u>Member programs/activities</u></b>	The Lodge does not present any programs that benefit its members.	The Lodge presents one or two programs for its membership per year.	The Lodge presents three or more programs for its membership per year.	The Lodge feels an obligation to present fun and meaningful programs for its members and tries to plan something for every month.	

**Examples: Widow dinner/program, PM recognition, father/son or father/daughter activities, Awards Programs, Community Builder Award, Holiday party/dinner, summer picnics, movie night, potluck dinners, (other social events), etc.**

## Education

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>LEO Program</b>	Education is not offered regularly, is not responsive to the needs of the Brethren, appropriate tools, courses, and resources are either unavailable or unused.	Education is offered regularly, but may be of one type or not responsive to the needs of the Brethren, appropriate tools, courses, and resources are inconsistently used.	Education is offered regularly, usually responsive to the needs of the Brethren, appropriate tools, courses and resources are consistently used.	Education is offered regularly, responsive to the needs of the Brethren, from many sources, perspectives, and experiences; appropriate tools, courses, and resources are consistently used.	
<b>Candidate Integration</b>	The Lodge does not integrate candidates, use recommended programs, or assign appropriate mentors.	The Lodge is inconsistent in integration, using recommended programs or assigning mentors	The Lodge is mostly consistent and effective in integration, using recommended programs and assigning mentors.	The Lodge is highly effective and consistent in integration, using recommended programs, and assigning mentors.	

## Retention/Growth

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Membership/ Retention Committee</b>	The Lodge does not have a Membership or Retention Committee.	The Lodge has a Membership and/or Retention Committee but they are not active.	The Lodge has a Membership or Retention Committee but not both.	The Lodge has a Membership and Retention Committee that are active in trying to avoid suspension for non-payment of dues and are actively looking for ways to grow the Lodge's membership.	
<b>Percent of Growth or Loss</b>	The Lodge had a net membership loss last year.	The Lodge membership number stayed the same or improved by less than 5% last year.	The Lodge membership increased by 5% or more last year.	The Lodge membership increased by 10% or more last year.	

## Attendance

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Officer</b>	The overall officer attendance is below 50%.	The overall officer attendance is between 50-70%.	The overall officer attendance is above 70%.	The overall officer attendance is above 90% or higher.	
<b>Members (% of total)</b>	The member attendance is 10% or below.	The member attendance is between 10-20% .	The member attendance is above 20%	The member attendance is above 30%	

## Leadership

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Courses (GL Courses, Freemason Univ., etc)</b>	Lodge officers or members do not participate in any of the leadership offerings	One or two members participate in some training activity	Several officer or key members attend one or more leadership offerings and share the information with lodge.	Lodge leaders use lessons from leadership training to improve programs, involve members, or attract new members.	
<b>Planning (Wardens planning coming year, etc)</b>	Lodge officers do not attend annual sessions.	An officer attended the training but did not bring it back to lodge as meaningful action.	Several officers attended training and discussed lessons with other officers and Past Masters.	The Wardens and Deacons meet and plans for the next year, making changes to lodge programs, policies and procedures.	
<b>Lodge has a clear plan and sense of direction for the year</b>	The lodge has not made a plan.	The lodge has a set of traditional activities it does, but no plans have been made to assess, add to, or improve attendance, performance, or outcomes.	The lodge officers and key leaders have discussed the lodge program for the coming year and agreed upon activities and key assignments.	The lodge has a mission statement, a recruitment program, a communications plan, and goals for contacting all its members. The WM has/follows an agenda every meeting.	

## Ritual

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Lectures, Charges and Degrees are presented from memory</b>	No Lodge officers or members can present ritual from memory.	All ritual is presented from memory by PMs or members other than officers.	All progressive officers are assigned (minimum): 1 lecture 1 charge The apron lecture Conferral of all three degrees.	The WM & SW have given at least a lecture, a charge, the apron lecture and conferred all three degrees. All other officers are working toward this goal.	
<b>Quality of Ritual</b>	Not all ritual is presented from memory and what is presented needs improvement.	All ritual is presented from memory but many words are wrong, mispronounced or lines/paragraphs are omitted.	All ritual is presented from memory. Pronunciation is good , no lines/paragraphs are omitted. The presentation is too fast, flat or lacks meaning.	All ritual is presented from memory. Pronunciation is good , no lines/paragraphs are omitted. The presentation is meaningful and well done.	

## Youth Groups

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Masonic (sponsor, support)</b>	The Lodge does not sponsor or support any Masonic Youth Groups.	The Lodge solely makes a donation to Masonic Youth Groups.	The Lodge does not sponsor a Masonic Youth Group but gives financial assistance to and/or participates by visiting and/or hosting a group.	The Lodge sponsors a Masonic Youth Group.	
<b>Non-Masonic (sponsor, support)</b>	The Lodge does not sponsor or support any Youth Groups.	The Lodge makes a donation to Youth Groups.	The Lodge does not sponsor a Youth Group but gives financial assistance to and/or participates by visiting and/or hosting a group.	The Lodge sponsors a Non-Masonic Youth Group.	

## **Charitable Giving**

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Masonic Charity</b>	The Lodge has not contributed to any Masonic Charities.	The Lodge has assisted one or more of our members/widows but has not contributed to any of the GL Charities.	The Lodge has assisted one or more of our members and has contributed one of two of the GL Charities.	The Lodge assists members when the need arises and and contributes all of the GL Charities. These charities are budgeted items.	
<b>Non-Masonic Charity</b>	The Lodge has not contributed to any Non-Masonic Charities.	The Lodge has contributed less than 1% of it's annual income to Non-Masonic Charities.	The Lodge has contributed less than 5% of it's annual income to Non-Masonic Charities.	The Lodge has contributed more than 5% of it's annual income to Non-Masonic Charities.	

## **Visitation**

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Officers/members visit other Lodges, Districts</b>	Officers and members do not visit other Lodges or Districts.	The WM visits some other Lodges in the District.	The progressive officers visit other Lodges in the District.	The Lodge has a plan to cover all/most installations, inspections in the District and to have a presence at District meetings and visit contiguous Districts.	
<b>Officers/members- Other Visitation*</b>	Officers and members do not visit members or widows.	The WM visits some of the members who are hospitalized and shut-in and widows.	The progressive officers visits some of the members who are hospitalized and shut-in and widows.	The Lodge has a committee that sees that members in the hospital, shut-ins and widows are visited and/or contacted regularly.	

**\*Example: Visit brothers in hospital, shut-ins, widows, etc.**

## Grand Lodge Support

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Representation at Annual Communication</b>	Only attends GL every other year.	In the past 10 years have missed having a representative at GL at least once.	Have at least one representative from Lodge attend every GL Communication.	At least the top three officers or their proxy attend every GL Communication.	
<b>File reports, pay per capita, answer correspondence, respond to requests, etc.</b>	The Lodge is consistently late or behind and need reminded to file reports, pay per capita, etc.	The Lodge is occasionally late or behind and need reminded to file reports, pay per capita, etc.	The Lodge is seldom late or behind and seldom need reminded to file reports, pay per capita, etc.	The Lodge is consistently on time and never need reminded to file reports, pay per capita, etc.	

## Finances

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Lodge living within income</b>	Lodge expenses exceed total annual dues + interest + other income.	Lodge expenses are covered by dues + interest + other income but there is little or no carryover.	Lodge expenses are covered by dues + other income with some carryover.	Lodge expenses are covered by dues + other income with carryover for investment.	
<b>Budget, Investment Committee, Fund-raising</b>	The Lodge does not have a budget, an investment committee or do any fund-raising.	The Lodge operates within a budget but and has savings/ investments but does not have an investment committee or do any fund-raising.	The Lodge operates within a budget and has savings/ investments and has an investment committee <u>or</u> does fund-raising.	The Lodge operates within a budget and has savings/ investments and has an investment committee <u>and</u> does fund-raising.	
<b>Audit process</b>	The Lodge does not have an appointed Audit Committee and asks a couple of members to do an audit at the last minute. The books and audit are not ready for pre-inspection.	The Lodge has an Audit Committee but the books and proper paperwork are not in order for the pre-inspection.	The Lodge has an Audit Committee books and proper paperwork are all available for the pre-inspection.	The Lodge has an Audit Committee books and proper paperwork are all in proper order for the pre-inspection and laid out in a way that makes it easy for the DDGM to find everything he needs.	



## Record Keeping

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Secretary</b>	Secretary's records are not in good order. Minutes are not signed at every meeting. Not prepared at pre-inspections. Mori not kept up-to-date. Secretary has a negative attitude.	Secretary's records are in good order. Minutes are not signed at every meeting. Not prepared at pre-inspections. Grandview not kept up-to-date. Secretary has a negative attitude.	Secretary's records are in good order. Minutes are signed at every meeting. Secretary has a Positive attitude. Mori not kept up-to-date, or Not prepared at pre-inspections.	Secretary's records are in good order. Minutes are signed at every meeting. Prepared at pre-inspections, Mori kept up-to-date and Secretary has a positive attitude.	
<b>Treasurer</b>	The Treasurer's records are not in good order. Not prepared at pre-inspections. Lodge records are not open for members to view. Treasurer has a negative attitude.	The Treasurer's records are in good order. Not prepared at pre-inspections. Lodge records are not open for members to view. Treasurer has a negative attitude.	The Treasurer's records are in good order. Not prepared at pre-inspections or Lodge records are not open for members to view or Treasurer has a negative attitude.	The Treasurer's records are in good order. Prepared at pre-inspections. Lodge records are open for members to view. Treasurer has a positive attitude.	

## Communications

	Ineffective (1)	Needs Improvement (2)	Positive Improvement (3)	Highly Effective (4)	Score (1 to 4)
<b>Internal Communication</b>	The Lodge does not communicate with its membership.	Lodge sends a monthly newsletter to its members.	Lodge sends a monthly newsletter to its members and has an up-to-date web site.	The Lodge uses multiple means of communications ie: Facebook, Twitter, email, etc. to communicate throughout Masonry and to the public.	
<b>External Communications</b>	The Lodge does not communicate outside of its membership.	The Lodge communicates with other Lodges within its District.	The Lodge communicates with other Lodges within its District as well as public communications.	The Lodge uses multiple means of communications with its members, ie: Facebook, Twitter, newsletter, calling system, text, email, etc.	