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## **OVERVIEW: OUR FRATERNITY 2000-2020**

*The longest journey begins with but a single step.*

*Ancient Chinese Proverb*

Freemasons cherish the rich heritage of the Fraternity. We share common bonds and beliefs with the likes of George Washington, Benjamin Franklin, Paul Revere and Joseph Warren. The tenets and ideals of the Craft provided the values upon which our country was founded.

Until the recent advent of the information age, there was a certain consistency to life. The manner in which people communicated and interacted with each other changed little in the 18<sup>th</sup> and 19<sup>th</sup> centuries. Then came electricity, the internal combustion engine and a host of other inventions. Transistors replaced vacuum tubes. The assembly line revolutionized industrial production. The pace of life accelerated and change swept the land.

The last fifty years has brought incredible speed to communications and the ability to process huge amounts of data. Cell phones and e-mails have connected people almost instantly (and inexpensively) around the globe. Vast amounts of information are available on the Internet to any person with a computer and a modem.

Technological advances have dramatically influenced our daily lives. Most institutions, including Freemasonry, now need to make difficult decisions as to modernizing their structures and operations or face extinction. Inaction is not a viable option.

In today's competitive marketplace, all corporations, whether for profit or charitable, must operate from the vision of a dynamic strategic plan. Our Grand Lodge is no exception.

This Long Range Plan addresses the need for measured, effective changes in Grand Lodge operations. It is a

suggested roadmap of where the Fraternity should travel over the next twenty years. Many of the recommendations will not likely be implemented in the next five to ten years (if ever). Its purpose, however, is to provide a starting point for discussions among Brethren about which of the various objectives should be accomplished during the next two decades.

This Long Range Plan does not seek to change the landmarks or tenets of the Craft. It only suggests some paths to take and some objectives to reach in our journey as members and stewards of Massachusetts Freemasonry. This report provides an important starting point for discussions about our future directions and goals. It should be reviewed in that context.

Once a consensus for a Long Range Plan is achieved, the next step (next year) will be to prioritize the objectives and determine a timeline of when they could be implemented.

This Long Range Plan was written by an excellent committee of Masons under the guidance and encouragement of our Grand Master, M.W. Fred K. Bauer. Hearty thanks go to each member of the committee. Four sub-committees wrote sections of the text under the leadership of Rt. Wor. Brothers Clayton A. Bemis, Paul E. Kennedy, Thomas E. Pulkkinen and myself. Bro. Pulkkinen also did much of the formatting and final editing.

For all those Masons who have said that something must be done to improve the way that the Fraternity operates, now is their opportunity to give their input about how to make the Fraternity better. All comments and suggestions will be most welcome and appreciated.

Rt. Wor. Stafford Sheehan, Chairman  
Grand Lodge Long Range Planning Committee

# **MASONIC ORGANIZATION**

# GRAND LODGE

Significant changes have occurred within our society over the past half-century. Two worker families! Increased job mobility! People working long distances from home! Weakened inner cities and movement to the suburbs! Evening television and Internet use replacing community involvement! People and businesses increasingly inter-connected through the use of advanced technologies!

Society's changing composition and mobility have dramatically affected our Fraternity. Significant changes have also occurred in the non-fraternal operations of Massachusetts Freemasonry, especially the Masonic health care network. Yet the organizational structure of the Masonic Fraternity in Massachusetts has remained essentially unchanged.

The Grand Lodge and to a lesser extent many of its subordinate Lodges and building associations have significant financial and physical requirements and resources. They also have complex and potentially high-risk non-fraternal business operations that require expertise that until now was not considered necessary to the management of the Craft and its various fraternal and non-fraternal operations.

For these reasons, the structure and operation of Grand Lodge and its subordinate and appendant bodies were reviewed.

## **FINDINGS**

The non-fraternal operations are of such increasing complexity that they may exceed the functionality of the existing organizational structure, as follows:

- Grand Lodge investments, facilities and complex health care related functions present financial, legal, reputation and other exposures for which the Grand Lodge does not have formal strategic risk management goals and programs.

- Management of the complex non-fraternal functions may not be adequately served in the future by the existing organization structure and staffing levels. Future elected and appointed leaders will need to possess prerequisite professional and business qualifications.
  - These issues affect organizational structures, division of authority, and the process and criteria employed in selecting candidates for elected and appointed positions.
  - The high risk and complex nature of non-fraternal operations argue for retaining highly qualified, paid professional talent from either within or without the membership.

Consideration of the Grand Lodge organization must begin with our Most Worshipful Grand Master who by our Grand Constitutions “is the presiding officer of the Corporation” and “is also Grand Master of Masons and as such enjoys *ex officio* all the powers and prerogatives conferred by the ancient Constitutions and the usages and landmarks of the Craft.” This authority is inherent in Freemasonry and must be preserved.

Our concern lies with the increasing demands placed upon our Grand Master. He must preside over the fraternal aspects of Massachusetts Masonry (membership, publicity, ceremonial duties, visitations, constitutional enforcement, correspondence, visits and meetings with other jurisdictions and collateral organizations, Masonic education, staff, physical plant, committee meetings, future planning, scholarships and charitable endeavors and other duties too numerous to list). In addition, he must effectively preside over and run the several boards and corporations that comprise the complex, two hundred million dollar Grand Lodge organization. The Fraternal and executive duties each constitute a full time job for an extremely talented and well-trained individual.

We ask (expect) our Grand Master to devote all of his waking hours to the Craft for three years. He is the final

decision maker on all financial and investment matters, and sets our goals and directions (committing finances and manpower to the future attainment of those goals)! After three years, we replace him with a successor who may or may not wish to pursue these same goals. The successor may or may not possess the business acumen of his predecessor and may very well be unwilling or unable to devote the incredible amount of time needed to properly execute all aspects of this position as it now exists and fulfill the ever-increasing fraternal demands that we place upon him.

Some say that change is unnecessary and that the Craft will continue to survive as we have in the past. While this perspective may be true regarding the fraternal responsibilities of the Grand Master, it most assuredly is detrimental to the discharge of his executive and financial responsibilities.

### **RECOMMENDATIONS**

We suggest that our financial growth and diversity of investments require the following divisions of responsibility:

#### **MOST WORSHIPFUL GRAND MASTER**

- His powers, prerogatives, and term of office remain as is.

#### **GRAND MASTER'S COUNCIL**

- Comprised of the Deputy Grand Master, Senior and Junior Grand Wardens, Grand Treasurer and Grand Secretary, with the Deputy Grand Master serving as Chairman and the Grand Secretary as the recording Secretary.
- Undertake such studies and initiatives as the Grand Master may assign.

## **GRAND LODGE BOARD OF DIRECTORS**

- Function cooperatively yet autonomously from the Grand Master, who shall be the Chairman of the Board of Directors.
- Have specified duties, responsibilities and prerogatives in the general oversight of the operations of Grand Lodge.
- Hire, terminate, evaluate, supervise and set compensation levels for all Grand Lodge paid personnel and may specifically delegate in writing the relevant portion of those duties to members of the management staff.
- Approve all actions by a majority vote of the Directors present and voting at a meeting of which all Directors received timely notice of the matters to be voted on thereat.
- Elect annually from its members a Vice-Chairman and a three member nominating committee (who shall propose candidates to fill Director vacancies and to be candidates for election by Grand Lodge to the Board).
- Fill any vacancy in the position of Director between Grand Lodge annual elections until the next annual election by a majority vote of the Board.
- Approve comprehensive job descriptions for all Grand Lodge paid personnel.

## **EXECUTIVE DIRECTOR OF OPERATIONS**

Professional with adequate training and experience in corporate strategic planning, management, marketing and finances as well as the dynamics and operations of nonprofit, volunteer-based organizations.

- Hired and terminated by a majority vote of Directors.
- Supervised and evaluated by a committee consisting of two Directors (selected by majority vote of the Directors) and the Grand Master.
- Reports directly to the Directors and Grand Master.

- Prepares and periodically updates concise job descriptions including duties, responsibilities and reporting requirements for all Grand Lodge positions.
- Compensated with salary, performance-based annual incentive bonuses and non-salary items (*e.g.*, health insurance, retirement, *etc.*) as determined by the Grand Master and the Directors.
- Employed with a three-year contract subject to renewal after the first year of each Grand Master's term.
- Masonic membership is a prerequisite.

### **RESPONSIBILITIES**

- Perform no Fraternal responsibilities whatsoever.
- Assist the Directors and Grand Master in managing the resources and operations of the organization.
- Direct the operation, maintenance and management of the physical plants belonging to Grand Lodge.
- Oversee public and fraternal communications, membership development, marketing, information technology and financial development initiatives.
- Work with the Chief Financial Officer in all financial matters, budgets and investments.
- Update regularly the long range plan and annually coordinate the plan of work that implements that long range plan.
- Retain such staff and office accommodations as the Grand Master and Directors may determine.

### **GRAND SECRETARY**

- Performs all fraternal responsibilities as detailed in the Grand Constitutions and as directed by the Grand Master.
- Reports directly to the Grand Master.
- Serves as Clerk to the Grand Lodge Board of Directors

- Serves as a member and recording secretary of the Grand Master's Council, but of no other boards.

### **GRAND TREASURER**

- Performs all fraternal responsibilities of the office as detailed in the Grand Constitutions and as directed by the Grand Master.
- Report directly to the Grand Master.
- Not a member of any committee except the Grand Master's Council.

### **GRAND COUNSEL**

- Members of the Craft who are also lawyers and members of the Massachusetts Bar shall be appointed by the Grand Master to constitute a Grand Counsel Standing Committee.
- Number of Committee members shall be as determined by the Grand Master.
- One member of this Committee shall be appointed by the Grand Master to chair the Committee and he shall be styled the "Grand Counsel."
- The primary function is to provide the Grand Master with advice on legal matters concerning Grand Lodge.
- He may, with the permission of the Grand Master, refer a matter to a member of the Standing Committee for his involvement.
- Members of the Standing Committee will not be compensated for serving on the Committee. They may, however, receive compensation for their services should they be assigned a case by the Grand Counsel.

### **DIRECTOR OF MUSEUM AND LIBRARY**

- Appointed annually by the Grand Master in consultation with the Directors.
- Serve as Chairman of the Standing Committee of the Museum and Library.

- Manage the personnel and the operations of both the Museum and Library.
- Prepare annual budgets for the Librarian, Curator, staff, repairs, improvements, programs and services and submit the budgets to the Directors.
- Coordinate the programming, promotion and marketing of the Museum and Library (*e.g.* becoming a part of the Freedom Trail; producing interactive and multimedia displays, dioramas, programs for school children; forming research groups; preserving video and oral history of the Craft).
- Reports to the Grand Master.

### **DIRECTOR OF DEVELOPMENT**

- Designs and monitors programs to develop financial resources for Grand Lodge initiatives.
- Supports Lodge and building association programs designed to raise funds needed to strengthen membership and facilities.
- Appointed by the Directors in consultation with the Grand Master.
- Reports to the Executive Director of Operations.

### **DIRECTOR OF PUBLIC RELATIONS**

(Note: This and the following four positions are further discussed under Public Relations and Marketing)

- Serves as the primary media spokesperson for Grand Lodge.
- Prepares and distributes Grand Lodge press releases to the media.
- Supervises Fraternal marketing and promotional programs.
- Hired/terminated by the Directors in consultation with the Grand Master.
- Reports to the Executive Director of Operations.

## **DIRECTOR OF FRATERNAL COMMUNICATIONS**

- Coordinates communications, programs and related training within the Fraternity.
- Coordinates Lodge/District participation in statewide public relations campaigns.
- Serves as an *ex officio*, non-voting, member of all Grand Lodge boards and committees.
- Publishes a Grand Lodge newspaper that is mailed to all Massachusetts Masons (*e.g.* similar to the Aleppo Shrine publication).
- Coordinates the publication of an annual Grand Lodge “Year Book.”
- Hired/terminated by the Directors in consultation with the Grand Master.
- Reports to the Executive Director of Operations.

## **DIRECTOR OF MARKETING**

- Oversees marketing campaigns, maintaining their focus and giving periodic reports and updates to the Board of Directors.
- Reports to the Executive Director of Operations.

## **DIRECTOR OF INFORMATION TECHNOLOGY**

An individual knowledgeable and experienced in state of the art electronic technologies who:

- Maintains and improves the format and content of the Grand Lodge presence on the Internet and provides assistance to Lodges and Districts on that subject.
- Reviews periodically the technological needs of Grand Lodge and recommends upgrades or new systems as needed.
- Advises Grand Lodge leaders on the cost, benefits, limitations and other pertinent aspects of various electronic systems.

- Assists the Library and Museum Division with the installation and upgrade of multi-media (interactive, research, historical and educational) presentations.
- Provides training in the use of upgraded or new systems.
- Integrates the various systems as needed and troubleshoots problems with minimal disruptions.
- Provides adequate access to and security for the information processed by and stored on the Fraternity's computers.
- Advises Districts and Lodges on the compatibility and capability of electronic equipment and systems they use for data storage, reporting, investment and real estate management, *etc.*
- Remains abreast of new technologies and makes suitable preparations prior to installing new systems.
- Hired/terminated by the Directors in consultation with the Grand Master.
- Reports to the Executive Director of Operations.

### **DIRECTOR OF MEMBERSHIP DEVELOPMENT**

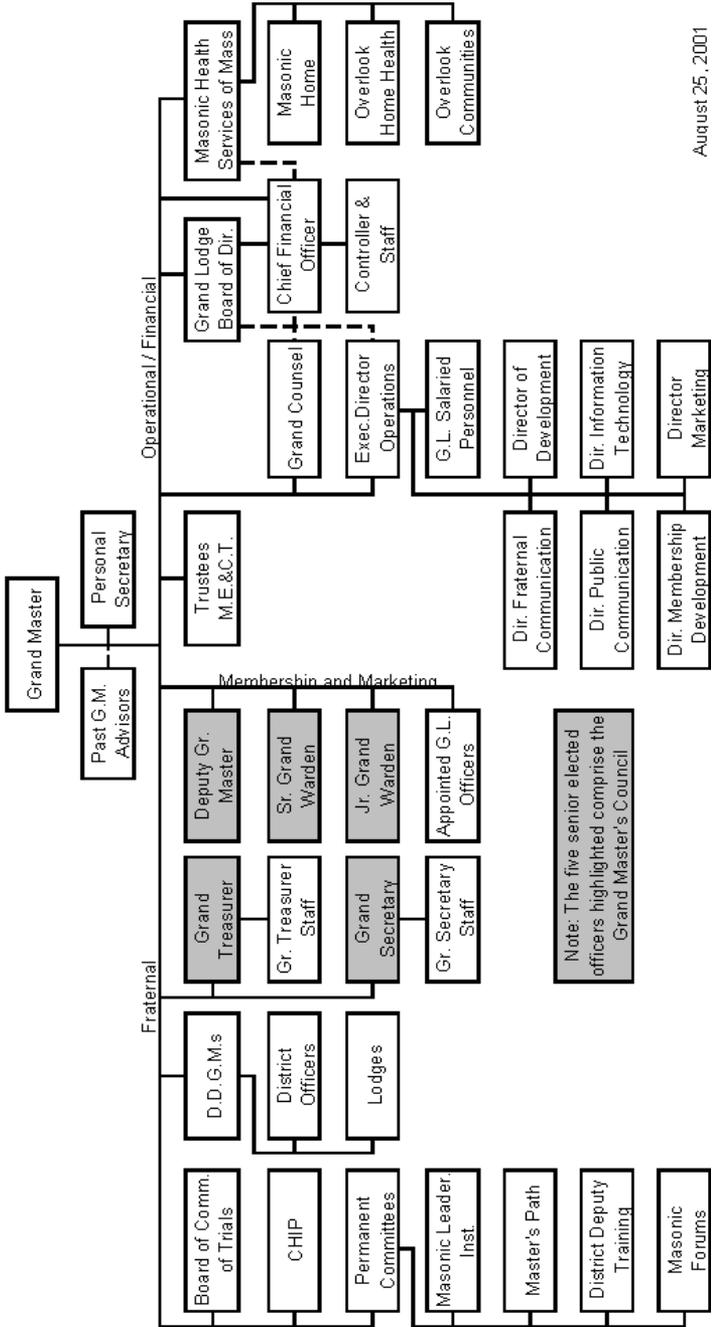
- Initiates and monitors programs to obtain new members and retain existing ones.
- Provides support to Lodge and District initiatives to strengthen membership.
- Appointed by the Directors in consultation with the Grand Master.
- Reports to the Executive Director of Operations.

### **GRAND LODGE OFFICERS**

We see no reason to change our proven system of Grand Lodge officers, however, consideration should be given to the number of District Deputy Grand Masters and their function. To succeed in the future, Grand Lodge must take a more active part in the development, management and funding of our Lodges. We have the resources and

leadership talent needed to help guide our Lodges through the myriad of changes, downsizing and in many cases mergers that will be required in the next score of years. The only way to effect this necessary paradigm shift is through a redesigned and restructured District system and a rethinking of our purpose for being.

# The Most Worshipful Grand Lodge of Ancient Free and Accepted Masons of the Commonwealth of Massachusetts



Note: The five senior elected officers highlighted comprise the Grand Master's Council

# **ALIGNMENT OF MASONIC DISTRICTS**

Massachusetts Lodges have been organized into 44 Districts for many years. Districts now have between four and ten Lodges. In some communities, Lodges from two, three or even five and six Districts meet in the same Masonic apartments. Some Districts have only a few strong Lodges, while others have none. In addition, our Grand Lodge has placed an ever-increasing workload on the District officers.

The most effective District system will include the following:

- Strong inter-Lodge support and cross-visitation,
- Adequate and dynamic leadership,
- Long term, steady membership growth,
- High retention of current membership support,
- Financial stability,
- Accessibility for each member within the District,
- Community awareness and support,
- Frequent communications and public relations programs,
- Involvement by the entire family,
- Personal commitment to Masonic outreach programs,
- Close support from Grand Lodge,
- Lodge and program diversity throughout District, and
- Infusion of Mass Masonic Alliance strategies and support.

## **FINDINGS**

- Districts should be realigned and reduced in number.
- Paid District “field support” assistance may become necessary
- Community service programs would be more effective if conducted on a District level.

- Accountability becomes easier and leadership potential better with fewer Districts.
- Educational, membership development and other programs can be more readily conducted on a District basis.

### **RECOMMENDATIONS**

Districts need to be consolidated and revamped. An improved District organization presents a better opportunity to improve the quality and attendance of Masonic Forums and Lodge meetings, programs and activities. The establishment of a new District system would permit installations and Fraternal visits to be done once per District each year, freeing up the time of the officers and District Deputies for other Masonic work and programs.

- An effective District System requires a thoughtful structural realignment.
  - The current District system will need to be entirely reorganized.
  - The District will become a governing authority.
- A strong Masonic Fraternity will be promoted by building strong working relationships with other “Partnership Assets” in the District.
  - Massachusetts Masonic Alliance
  - Scottish Rite
  - York Rite
  - 32° Masonic Learning Center for Children
  - Shrine Orthopedic Hospital and Burns Institute
  - Prince Hall Freemasonry
  - Other community partner organizations

# **FACILITIES & FINANCE**

# **ASSET MANAGEMENT**

The Long Range Planning Committee considered and made recommendations relative to the long-term investment, utilization and management of the buildings and financial resources of the Grand Lodge and its subordinate Lodges and building associations after considering the:

- Use and maintenance of existing properties, development of alternative facilities
- Qualifications and training of persons responsible for the management, investment, use and protection of physical and financial resources,
- Relationship between the Grand Lodge, subordinate Lodges and building associations, and
- Compliance with federal and state tax regulations.

# **GRAND LODGE BUILDING IN BOSTON**

The design, condition, functionality and use of the Boston Masonic building were assessed with respect to how this facility meets current and future needs as a meeting, office and historic location for the Grand Lodge and its appendant and subordinate bodies.

## **FINDINGS**

The building is in generally good physical condition and nearly all portions of the building are handicapped accessible, although restrooms and some other facilities do not meet handicapped design specifications.

- Lodge rooms are architecturally beautiful and provide ample space for the Fraternal meetings of the several Blue Lodges and appendant bodies meeting in Boston.
- Attendance at the December quarterly and Feast of St. John's are currently too large to be accommodated in one or even two Lodge and dining rooms.
- Grand Lodge and other bodies make extensive use of hotels for educational and other programs, as the Grand Lodge building does not have sufficient functional Fraternal, educational, parking and "socially attractive" dining facilities.
- The Scottish Rite Valley of Boston increasingly uses facilities outside Boston and is exploring the development of headquarters and meeting space outside the Grand Lodge building.
- A substantial portion of the building is idle most of the time, which would be exacerbated should the Valley of Boston move out of the building and the York Rite Grand bodies consolidate into one location.
- There are attractive opportunities for Masonic bodies located outside Boston to hold special Lodge meetings and other functions in the Grand Lodge building.
- No handicapped accessible parking is currently available near the Grand Lodge building. Parking is generally unavailable for daytime meetings and

parking for evening and Saturday meetings can be expensive for many Brethren. Extremely heavy traffic to and within Boston discourages member attendance.

- The Grand Lodge building has relatively good proximity to public transportation systems (subway, commuter rails and the bus terminal), which is important to meetings of Boston-based Lodges and appendant bodies, but is less beneficial to Grand Lodge functions where Brethren travel from throughout the jurisdiction.
- Lodge rooms and dining halls are not air conditioned, although this is being addressed in the current architectural evaluation and design of the Grand Lodge facilities.
- Museum and library space is inadequate and not climate controlled to protect valuable books and artifacts. Many books are stored in the damp cellar. These facilities could be modernized and promoted as historical and educational facilities for the general public, given the proximity of Grand Lodge to the Freedom Trail, which is being considered as part of the architectural review.
- Dining facilities are adequate size-wise for most meetings, but lack food preparation capabilities and are neither attractive nor air conditioned.

This assessment was completed during the summer and fall of 2000. Early in 2001, the Grand Lodge Board of Directors approved the installation of a new high-speed elevator, air conditioning, handicap accessibility and certain other improvements. In addition, the Board of has approved in principle a plan to upgrade sub-basement dining facilities and make renovations to the ground floor and contiguous space to accommodate a new library and museum that may be conducive to use by the general public interested in Boston's historic past.

These initiatives are considered to be positive developments. The following recommendations are offered for further Grand Lodge consideration in fulfilling its fiduciary responsibility for the

building. The recommendations consider the long-term facility needs of Grand Lodge, including both its fraternal and non-fraternal operations, and other bodies utilizing the Grand Lodge building and considers options with respect to the use of the remainder of the building.

### **RECOMMENDATIONS**

- Explore building a modern, multi-functional facility outside the city near the Massachusetts turnpike outside route 128 that might accommodate functions of Grand Lodge, subordinate Lodges and appendant bodies. This site might be developed in conjunction with appendant bodies and be made available for community and other non-Masonic organizations. The site would be more centrally located for persons traveling from around the state and would allow members to avoid Boston traffic and allow ample parking.
  - Explore construction and operation of a new facility with the Valley of Boston and perhaps some local Lodges and other Masonic bodies, on a site optimally accessible via train or other public transportation systems.
  - Provide Lodge, office, conference / instructional, dining, parking, hotel, social, theater and recreational space, perhaps in concert with affiliated health care providers.
  - Pursue development of the facility, with certain non-fraternal portions (e.g. hotel and recreational) perhaps separately owned and operated by another party, to meet our changing needs and to serve as a high-tech meeting and convention center open to Masonic and non-Masonic purposes.
  - Consider building on land adjacent to the Aleppo Temple, however, this site is not central to most Massachusetts Masons.
- Retain consultants to explore the feasibility of employing the condominium concept or extended

length leases for the Grand Lodge building to optimally accommodate Masonic and non-Masonic uses.

- Designate secure, self-contained and publicly accessible space for functions such as the library and museum.
- Provide Boston Masonic bodies with attractive, functional core office, meeting and dining space that is handicapped accessible with appropriate bathroom accommodations.
- Free blocks of unused or underutilized space for non-Masonic uses, *e.g.*, retail, dining, office or other uses, perhaps tied to the Millennium project.
- Designate the proceeds from any condominium sales or long-term leasing arrangements for the preservation of the building or for use with other available funds to build a multipurpose center outside Boston.
- Explore the feasibility of leasing limited handicapped evening only (plus quarterly meeting day) parking in the Millennium Project, which might be used by Grand Lodge officers during daylight hours, and encourage carpooling among eligible members.
- Promote opportunities for expanding Masonic and public traffic within the Boston Masonic facility.
  - Renovate and expand the library and museum facilities, providing environmentally modern facilities with expanded display of historical records and artifacts.
  - Promote public / student interest in and access to the museum / library as part of the Boston Freedom Trail and the city's promotion of its historic past.
  - Encourage Lodges outside Boston to utilize the Grand Lodge facilities for Lodge meetings and/or in concert with shopping / historical / educational and entertainment trips for members and guests.

- Explore inclusion of exhibits from the Scottish Rite Museum of our National Heritage.

# **MASONIC FACILITIES OUTSIDE BOSTON**

The condition, functionality and use of Masonic facilities used by subordinate Lodges were considered, for the purposes of this report, solely upon personal knowledge rather than a physical review of properties.

## **CONDITION / FUNCTIONALITY OF MASONIC BUILDINGS**

### **FINDINGS**

Generally, the large proportion of Masonic facilities:

- Do not meet modern functional requirements in terms of current space needs, heating, air conditioning, handicapped accessibility and parking.
- Are not suited for multiple/dual Masonic and public uses, denying the Fraternity of opportunities to:
  - Bring the community and Masonic families into the buildings for non-fraternal functions, and
  - Supplement income from non-Masonic sources, which is often increasingly necessary to limit dues increases as Lodges experience revenue shortfalls to fund Lodge activities and building expenses.
- Require substantial funding for renovations, maintenance and operating costs, resulting in accelerating rent and declining resources to support services to the membership and activities within local communities and, therefore, financial stress to Lodges and other bodies.
- Used decreasingly as Lodges and other bodies become less active, consolidate and even cease to exist.

## **LOCAL AND GRAND LODGE ROLES IN MANAGING FACILITIES**

The Grand Lodge charters Lodges, and Lodges or groups of Masons organize building associations to provide suitable and safe facilities for the meetings and activities

of Lodges and other Masonic bodies. The Grand Lodge coordinates insurance for many of these facilities.

Local Masons have direct responsibility for the operation and condition of their Lodges and building associations, yet the Grand Lodge has an interest in the condition, safety, financial integrity, and use of local Masonic facilities.

## **FINDINGS**

- No Grand Lodge employee or committee is responsible for assessing the physical and financial condition of Masonic facilities overseen by building associations across the jurisdiction.
- While professional risk analysts, provided through insurance carriers, document conditions at local Masonic facilities, the focus of these reviews is more on safety issues than the physical condition, use and needs of these facilities.
- A program is not in place to systematically identify and quantify potential financial and legal exposures relative to:
  - Public safety,
  - Unclear or at-risk ownership structure and title for building association assets by local Masonic bodies,
  - Building structural integrity and maintenance / repair needs, except when a local Masonic body applies for Grand Lodge financial support in meeting building needs, and
  - Handicapped accessibility to and within these structures. (While legal counsel advises that Masonic bodies are exempt from laws governing handicapped accessibility, the Fraternity should respectfully endeavor to accommodate the access needs of its members.)
- The Grand Lodge is not well positioned to assign priorities to requests for funding support to upgrade Lodge facilities or to consider the utility of these

facilities in providing for the long-term needs of the Fraternity.

## **RECOMMENDATIONS**

- The Grand Lodge should form a centralized facilities management advisory team that can capably assess and make recommendations on building safety, maintenance, systems upgrade, renovations, insurance coverage and optional / optimal use, and to offer guidance on building construction and renovation projects.
  - The proper role of the Grand Lodge in this regard should be to provide guidance to Lodges and building associations through the use of training programs and other vehicles on how to proactively address / provide for long-term building and financial needs and to facilitate solutions to asset management problems and needs.
  - The Grand Lodge support team should be comprised of persons with expertise in real estate, law, architecture, contracting, zoning/compliance, landscaping and other disciplines.
- The Grand Lodge should work cooperatively with local Masonic organizations to inventory and evaluate the facilities owned (or rented) by the Fraternity.
- A select Grand Lodge working group should combine the work of the centralized facilities management advisory team with a separate assessment of the Fraternity (Lodges and other bodies) to formulate a strategic course designed to facilitate efforts to provide facilities that meet the needs of the changing Craft and to help strengthen the Craft going forward.
  - The condition and utility of existing and possible new facilities might be considered in any future realignment of Districts initiated by one or more Masonic Lodges, or by Grand Lodge in response to

changing membership demographics and other considerations.

- Alternative strategies for the use and funding of existing old facilities in central cities may need to be considered if local Masonic bodies cannot afford the buildings while serving member needs in light of membership trends and the relocation of Lodges to alternative locations.
- The Grand Lodge should organize an *ad hoc* working group of real estate, legal and other experts to: (1) determine the legal relationships of the Grand Lodge, subordinate Lodges and local building associations, (2) consider legal options for optimizing the use and financial strength (including cash flow) of Masonic facilities without compromising tax exempt status, and (3) develop policy guidance for subordinate Lodges and building associations on weighing the tax, liability and other implications of building associations allowing their facilities to be utilized for non-Masonic revenue producing purposes.
  - The working group should explore available / optimal opportunities to utilize Masonic facilities for non-fraternal income producing purposes under existing general and real estate tax laws, and what optional approaches might be employed to optimize the use of the facilities for the good of the Fraternity and its works within the community.
  - The working group should offer general and *ad hoc* advice on how unutilized properties controlled by Lodges / building associations could be transferred to real estate investment trusts – or otherwise employed – to produce income to support building operations and Lodge activities while preserving the tax-exempt status of the Masonic bodies.

# **FINANCIAL MANAGEMENT**

As discussed under Masonic Organization, the Grand Lodge and, to a much lesser extent, many of its subordinate Lodges have significant financial and physical resources. In addition to Grand Lodge issues addressed in the first section of this report, opportunities exist to strengthen the operations of subordinate bodies.

## **FINANCIAL MANAGEMENT OF LODGE / BUILDING ASSOCIATION RESOURCES**

While each Lodge and other Masonic body has its own tax identification number for federal and state tax purposes, the entire Fraternity could be exposed by Masonic organizations not being in compliance with federal, state and local tax laws and regulations, as well as guidelines for charitable giving by tax-exempt organizations.

Effective management of the financial and investment operations of Lodges and building associations would benefit from the Grand Lodge providing training to financial officers responsible for complying with requirements imposed by the Grand Lodge and federal, state and local governing authorities. While many Lodges employ one of several investment houses, these parties may not always have prudent depth of personnel involved in Lodge investment activities and may produce returns below those that might be earned in a larger “Fraternal Investment Plan” offering various investment options.

### **RECOMMENDATIONS**

- The Grand Treasurer / Education Committee should give priority attention to the development and publication of a *Treasurer's Handbook*, which should be supplemented with training programs for Lodges and building associations on:
  - Investment strategies,
  - Financial management,
  - Annual and long-term project budgeting,

- Record keeping, and
- Federal, state and municipal financial / regulatory reporting requirements for fraternal organization.
- Consideration should be given to further leveraging the Grand Lodge sponsored investment vehicles to benefit subordinate and appendant Masonic bodies as well as the general membership.
- A formal program should be implemented to introduce all Massachusetts Masonic bodies to the multiple investment strategy options available through the Grand Lodge investment program.
  - The Grand Treasurer should determine the extent to which existing programs meet sound investment goals for Lodges and building associations.
  - The Grand Lodge should develop an approach to discuss and market investment programs and strategies with interested Lodges, building associations and appendant bodies.
- The Grand Lodge holds substantial investments. A committee should assess the opportunities for the Grand Lodge to work with investment brokerages to determine whether investment accounts – mutual funds – could be offered to Massachusetts Masonic bodies and the general membership, leveraging off the Grand Lodge investment base and business relationships to offer such investment opportunities at no or low cost to the Masonic Lodges and Brethren.

## **INFORMATION SHARING: LODGES WITH GRAND LODGE**

Many Lodge leaders consider information on the financial resources of Lodges and building associations to be proprietary that need/should not be shared with the Grand Lodge even for informational purposes. These leaders are often unwilling to open records for review or analysis, or for determining compliance with federal and state laws and regulations.

The legal, fraternal and operating relationship between the Grand Lodge and its subordinate Lodges is based upon the Constitutions of the Grand Lodge and the charters granted by Grand Lodge to subordinate Lodges. Building associations are accountable to the Lodges and other bodies that established the building associations and that hold stock and voting rights therein. Beyond these considerations, Grand Lodge and its elected and appointed leadership are entrusted with the responsibility for promoting and safeguarding the continued legal and ethical standing of the Fraternity before federal, state and local officials and the public.

Similarly, Lodges and building associations are responsible for addressing the interests and needs of Freemasons locally. This requires the bodies to work in harmony not only with one another, but also with public laws and regulations, as well as the Constitutions and Regulations of the Grand Lodge. Effective communications among local and Grand Lodge Masonic officers can aid and assist local bodies to optimally fulfill their responsibilities in accordance with governing requirements.

### **RECOMMENDATIONS**

The Grand Lodge should communicate with Lodges on the following issues in a manner that exemplifies the Grand Lodge's commitment to benefit the Fraternity in every way possible through building positive, cooperative

working relationships with Lodges and other Masonic bodies.

- The legal and business relationships among Grand Lodge, subordinate Lodges and building associations.
- The authority that rests with each body, professional guidance that is available to subordinate Lodges and building associations, and when Grand Lodge notification or approval may be required.
- How a cooperative, working relationship can benefit the Fraternity and the local bodies across the jurisdiction.
- All policies, responsibilities, authorities and procedural guidelines covering the asset management roles and relationships of Grand Lodge and its subordinate bodies.
- Frequently asked questions on investment and asset management, financial reporting, and compliance with federal, state and local tax reporting requirements, thereby promoting a standard, improved understanding of existing requirements and opportunities that should guide the performance of Lodge and building association leaders.



# **MEMBERSHIP & MEETINGS**

# **MASSACHUSETTS FREEMASONRY: MEMBERSHIP DEMOGRAPHICS**

Membership in the Fraternity is in decline, and participation by the existing Brethren in the work and activities of the Craft is at dangerously low levels. Massachusetts Masonic enrollment has declined from about 135,000 in 1961 to less than 50,000 today. That means that net membership has declined by over 85,000 Brethren over the past 33 years due to death, suspension, demits and other reasons. During that same period, however, the number of Blue Lodges has only decreased from just over 300 to about 275. As many as 100 Lodges today have only a small group of active members, raise few candidates, do not regularly attend or support District and Grand Lodge functions, and provide little incentive for members to participate in Grand Lodge activities.

## **FINDINGS**

- The median age of the Brethren is about 67 years.
- Many older Brethren are unwilling or are unable to venture out at night.
- Many Masonic buildings are not accessible for older or disabled Brethren, and the expense of maintaining or bringing the buildings in compliance with Federally mandated requirements (*e.g.*, Americans with Disabilities Act) is beyond the ability of Lodges and building associations.
- Activities in appendant bodies compete for “Fraternal Time.”
- There are not enough opportunities for family involvement in Masonic activities.
- Many other demands and activities compete for the time and energy of Brethren.
- The public is not aware of the Fraternity and its benevolent activities.

## **RECOMMENDATIONS**

Stopping the decline in membership and increasing the net number of Brethren each year must be the primary objective of the Craft if it is to remain viable in the future. Our success depends on many variables, such as: effective Fraternal public relations and marketing; leadership training for the Brethren; consolidation of Districts and Lodges; and so forth. The factors that gave rise to the current situation are complex, yet solutions to these seemingly intractable hurdles can be found. Resolving the membership dilemma will require a broad range of initiatives undertaken on the Grand Lodge, District and local Lodge levels, and will have to continue for at least the next decade.

# GOVERNANCE OF BLUE LODGES

## RELEVANCE

In a time when more and more activities are competing for a smaller and smaller reservoir of available time, any involvement in fraternal activities such as Freemasonry must be directly related to an individual's major priorities.

### FINDINGS

- Members generally view major priorities as family and friends, faith, career, personal improvement, and community service/philanthropy.
- Appeal/benefit of membership should be fun, family, fellowship, philosophy and philanthropy.
- Retention of existing members/clients/customers is generally more efficient, effective, productive and profitable than the acquisition of new members/clients/customers (even though new member acquisition is clearly important to the long term health of the organization).

Two domains of historical Masonic significance have become diminished in recent history. Those two areas are *self-improvement* through training and education (e.g. the ancient craft guilds) and *economic benefit* (both career-based and home finances-related) through networking with Brethren for job advancement, employment changes, household purchases and home improvements. When these “needs” are addressed by Freemasonry in a meaningful way, Brethren feel that the time they invest in Masonic activities will add value to their families' well being, rather than take time away from their family responsibilities and relationships.

### RECOMMENDATIONS

Initiatives relating to these two areas should be assigned to Grand Lodge staff: networking database development to the Director of Information Technology, and training and education to the Director of Education and Training as

well as the Chairman of the Masonic Leadership Institute Board of Trustees.

The Masonic Leadership Institute offers a starting point for bringing Masonry into the business of training, education and leadership development in a meaningful way. Also emerging from the Masonic Leadership Institute are several initiatives related to the creation and administration of databases that can be used to facilitate networking and information sharing with a view towards career-based and home finances-related economic benefit.

## **FORM**

The presence of a Masonic Fraternity relevant to the membership presumes the prerequisite existence of strong Lodges that meet the vision and supporting principles of Freemasonry in Massachusetts. The form of the Lodges may influence their relevance.

## **FINDINGS**

The viability of individual Blue Lodges and the protection of “the brand” are seen as vital concerns and raise the following questions.

- Should there be a minimum number of actively participating members required for a Lodge to retain its charter?
- Should there be a maximum number of members to assure a beneficial atmosphere within the Lodge?
- Should there be “District Lodges” that conduct ritual and provide activities for other Lodges and square and compasses clubs in the District.
- Should there be statutory “house” lodges or “square and compasses clubs” for men who want to retain their membership status but not actively participate in the business of Lodges?
- Should there be a maximum or minimum number of Lodges per District?
- Should a Lodge’s charter share some of the functionality of a franchise agreement?

- Should we actively revisit other forms of affinity besides geography (*e.g.* occupation, education, language, national origin, invitation only)?
- Should these issues be considered at the District level as well as at the Lodge level?

### **RECOMMENDATIONS**

- After the Districts have been rationalized (*i.e.* reorganized into more meaningful geographic aggregates and reduced in number) we could move to rationalize the Blue Lodges.
  - Minimum (26) and maximum (150) active member thresholds could be established.
  - Minimum attendance (six per year) thresholds also might be established.
  - Passive or inactive members could be moved into a Rusty Brother Lodge that will be created for each District.
  - The Grand Counsel could be assigned the charter validation project initiative, which would entail developing a series of criteria or parameters (*e.g.* minimum membership, attendance requirements, financial solvency, new officers, ritual quality, public service to their community) to determine whether marginal Lodges should retain their charters.
- Masonic membership within the District must parallel its demographics and population trends. Each Lodge should be thoroughly assessed for the following potential actions.
  - Become a “District Lodge” conducting degree work and services for other Lodges.
  - Continue not as a “Lodge” as presently perceived but in some other form (*e.g.* square and compasses or social club).
  - Relocate to another community.
  - Merge or consolidate with other Masonic bodies.

- Operate at a different time or for a different purpose.
- Integrate with other Masonic based organizations on a day-to-day basis.
- Become part of a District Masonic Alliance network to support District strategies.
- Cease to function entirely.

## **QUALITY CONTROL**

The manner in which Lodge work is presently conducted is inconsistent from Lodge to Lodge. It is often less than adequately presented and can become boring, thus decreasing the chance that Brethren will attend and participate.

Many factors in addition to the form of the Lodge can affect its vitality as a fraternal body and its attractiveness to existing and prospective members. Building vibrant Lodges requires the identification of “negatives” that can weaken Lodges as well as “best practices” that can strengthen the Craft.

### **FINDINGS**

- We may be able to identify negative patterns that contribute to the decline of a Lodge so that we can be vigilant in detecting early signs of such patterns. Who should have the role of monitor, the District Deputy?
  - Many Brethren receive little or no education on Masonry.
  - Many Lodges are not meeting the interests and needs of the Brethren.
  - Weak Lodges often present poor ritual, provide no opportunities for family involvement and offer no “fun” for the members.
  - Some cities and towns have multiple Lodges competing for candidates and sideline Brethren.
- Negative patterns may include:

- Financial weakness (unable to fund expenses and capital improvements)
- Disharmony (*e.g.* political in-fighting, nepotism)
- Decline in quality of ritual (cipher and/or floor work)
- We may be able to identify positive patterns that contribute to the vitality of a Lodge so that we can share these “best practices” with other Lodges.

### **RECOMMENDATIONS**

- The Grand Treasurer and Grand Lecturers should be assigned project responsibility for the negative patterns identification project, with support from District Deputy Grand Masters and participants in the Masonic Leadership Institute.
- Responsibility for the positive patterns identification project might be assigned to the Grand Lodge Director of Membership Development with assistance from MLI participants.
- Minimum standards should be adopted that Lodges must meet in order to retain their Charters. For example,
- The percentage of participating Brethren, number of candidates raised, attendance and participation at District and Grand Lodge functions, training of officers, *etc.*
- Lodges that do not meet these standards should be encouraged, if not mandated, to merge with other, stronger Lodges in order to create stronger, more active Lodges.
- The number of Lodges we have is not as important as the strength in the Lodges we have.
- The formation of District Degree teams, composed of members from all the Lodges in the District, would ensure high quality degree work, and could stimulate a friendly competition between the Districts, thus strengthening Masonry.

## **OFFICER SELECTION**

Effective Lodge leadership is essential to the successful building of Lodges that will provide quality programs and degree work that current and future members require.

### **FINDINGS**

- Processes and protocols used to select and develop leadership at the Blue Lodge level can have a profound effect on the vitality and dynamism of the Lodge.
  - Do we need any changes in the nomination or election protocols?
  - Should Lodges move toward two-year lines?
  - Should we set a maximum number of Past Masters who can occupy chairs in the line on a basis other than as stand-ins for an evening or as interim appointments to fill an unexpected vacancy?
  - Should Lodges be encouraged or required to have elected leaders attend the Masonic Leadership Institute and/or other Grand Lodge leadership development programs?

### **RECOMMENDATIONS**

The question of whether changes need to be made to the nomination or election protocols, as well as the officer development process, should be addressed at the District level after rationalization of the Districts, as described above. The questions of whether all Lodges should migrate toward a two-year line and whether there should be personal development prerequisites for office will be handled in an identical fashion.

After rationalization of the Blue Lodges, as described above, Lodges that consist of thirteen officers (Worshipful Master, Wardens, Treasurer, Secretary, Chaplain, Marshal, Deacons, Stewards, Inside Sentinel and Tyler) could have a maximum of six officers' chairs occupied by an individual who is a Past Master of any Massachusetts Lodge.

Last but hardly least, we may need to reset the expectations that we have for and the time demands that we place on our most loyal members. It is a common failing among service organizations (especially not for profit service organizations) that certain people are asked to carry a disproportionate share of the load. Freemasonry is no exception to this generalization. We inadvertently burn out some of our most loyal supporters by having unrealistic expectations of them or by placing unreasonable demands on their time and energy. Then we are alternatively shocked or dismayed when they die or demit. We must help our Brethren balance the load more artfully; they should never be placed in the position of having to choose between their families and the Craft.

# **PUBLIC RELATIONS & MARKETING**

# **DEFINING FREEMASONRY FOR THE PUBLIC**

Freemasonry is the largest and oldest charitable fraternity in the world. Yet, most people do not know who the Masons are, what charitable works we do and what common beliefs we share. In fact, a majority of Brethren can only describe the Craft in terms of their personal and subjective experiences. No simple, objective description of the Fraternity is readily available. The resulting lack of a public identity has dramatically reduced the number of prospective candidates, decreased support for charitable endeavors and allowed negative publicity to stand unchallenged in the court of public opinion.

## **FINDINGS**

- The Grand Lodge of Massachusetts, organizationally, is a mid-size corporation that is in the business of providing services to its volunteer members.
- Freemasons subscribe to the tenets of Brotherly Love, Relief and Truth and to the precepts of Fun, Family, Fellowship and Service.
- Freemasonry needs an objective, short, clear, concise, relevant and compelling message to the public.

## **RECOMMENDATIONS**

- The message must be professionally written and should be crafted in conjunction with a major (long-term) media marketing campaign.
- The message should be initially and periodically test-marketed through “focus groups” to determine its effectiveness.
- The message must accurately sum up “Who we are,” “What we do” and “What we believe,” in words and context that effectively “communicate” to targeted audiences whom the Fraternity needs to reach in order to attract quality candidates and obtain recognition and support for community service programs.

- The message needs to blend the rich heritage of the organization with its bright promise for future achievements.
- In short, the message must convey a positive public image of the Craft by incorporating the values we promote, the fun and fellowship we enjoy and the people we help.

# **PUBLIC AWARENESS**

Freemasons need to build and maintain a positive, ongoing public awareness of the Craft: its message, members and accomplishments.

## **FINDINGS AND RECOMMENDATIONS**

- The qualities and values (called the message) of the Fraternity need to be effectively and consistently communicated to family, friends, business associates and the public at large.
- The message must be professionally marketed through a multi-media approach to target audiences.
- Present members of the Craft must be personally involved in this marketing campaign.
- The marketing campaign should be viewed as a priority investment that needs to be adequately funded by Grand Lodge (*i.e.*, a commitment to continue for an extended period of time).
- Given today's marketing requirements, the message must be adaptable to 30 and 60 second spots on radio and television as well as deliverable through the print (display) media.
- Benchmarks should be set to assess, while in progress, the effectiveness of the campaign in achieving its goals.
- A paid qualified employee, titled the Director of Marketing, should oversee the marketing campaign, maintain its focus and give periodic updates and reports to the Board of Directors.

# **PUBLIC RELATIONS**

The Grand Lodge must effectively utilize the print and electronic news (and feature media) to publicize Masonic accomplishments, educate the public about the craft and react effectively to negative issues. That will require an experienced spokesperson having the needed media contacts who can be both pro-active in promoting the Craft and reactive in the face of negative publicity about the Fraternity.

## **FINDINGS AND RECOMMENDATIONS**

- One of the most glaring problems to periodically confront the Fraternity is the lack of an experienced and knowledgeable spokesperson to speak for the organization in the media when a negative public issue arises.
- To be effective, the spokesperson needs to have previously made contacts in the print and electronic media that can be utilized when the occasion calls for a position or statement to be publicly distributed.
- The Craft has much positive news and views to communicate. Community service programs such as the Scottish Rite Learning Centers and the Child Identification Program are feature items worth often repeating. The promotion of family values is central to the beliefs of the Fraternity and can be the subjects of public comments by the Fraternity.
- Good news is often harder to get published or broadcast than so-called bad news. It often takes more time, energy, luck and skill.
- A Director of External Communications should be, therefore, both proactive and reactive in placing the Fraternity's news and views in the media.
- Key to that success will be the knowledge and extent of contacts in the media that the individual brings to the position as well as the person's familiarity with issues confronting Freemasonry today.

# COMMUNICATIONS WITHIN THE FRATERNITY

Masons need timely and accurate information about the activities and accomplishments of the members of the Craft. That information promotes Fraternal unity and pride, and results in individual members being better able to attract new members. Individual achievements can be recognized and replicated. A sense of inclusion among members can be promoted. Instructional topics can be regularly addressed resulting in the Brethren becoming more confident and better informed Masons.

## FINDINGS

- To date, an intermittent trickle of information flows between Grand Lodge and the Brethren.
- Many, if not most, Brethren are simply not aware of the many charitable endeavors now offered through the many bodies of the Fraternity, the positions on Fraternal and public issues taken by Grand Lodge, or even the edicts issued by the Grand Master.
- Several existing vehicles (*e.g.* the quarterly *Trowel* magazine, occasional mailings from the Grand Master and Grand Secretary) have limitations in space, timeliness and circulation.
- Accumulating “news,” editing and writing a newspaper-type publication and distributing that periodical to all Massachusetts Masons is a complex and demanding task that cannot rely solely on volunteer efforts.

## RECOMMENDATIONS

- A Director of Internal Communications is needed to ensure the timely and smooth flow of information within the Fraternity.
- That Director can also provide other valuable services:
  - Writing articles for Lodges to include in newsletters.
  - Assisting Masons in writing press releases.
  - Providing public relations training for Masons.

- Editing an annual “Yearbook” as a keepsake for the Craft and possibly a fundraiser for the scholarship fund.
- This employee needs excellent writing, editing, communications and interpersonal skills. The person should have knowledge about the Craft, the ability to meet deadlines, computer and Internet skills, *etc.*

# INFORMATION TECHNOLOGY

The Fraternity must stay on the cutting edge of new information technology in order to (even marginally) perform its organizational and fraternal functions in the future. Technology is changing at an ever-increasing speed. To be competitive in attracting and retaining members, conducting community service activities and communicating both within and without the Craft, Freemasons must utilize the most effective information technology available.

## FINDINGS AND RECOMMENDATIONS

- Today, wireless communications are viewed as the next advance in the explosive field of communications technology. Tomorrow, a new (more esoteric?) mode or medium for communications will be developed. Technological advances are occurring today at an exponential rate.
- To become (and then to remain) competitive, Freemasonry will need a full-time Director of Information Technology (DIT).
- While such a position was largely unheard of a decade ago, this employee will become an indispensable part of the Grand Lodge management team within the next few years.
- The DIT is needed to coordinate the presentation and content of the Grand Lodge website and to assist Districts and Lodges to also have a presence on the Internet.
- The DIT must also review how the many departments of Grand Lodge operate in light of the new technology available. Upgrades and new systems are expensive investments, not just to install but also to maintain and to train employees in their use.
- The integration of systems is a specialty in itself.
- The level of knowledge, coordination, training, planning, budgeting, security and other vital input requires a paid employee to perform these tasks on a consistent basis