

Health of Lodges in Virginia Where are we, what do we know?

By

R. M. Solomon, PM

Presented to A. Douglas Smith, Jr. Lodge of Research, #1949

On

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The opinions presented in this paper are strictly those of the author and do not necessarily represent the opinions of the Master and Wardens of the A. Douglas Smith Jr., Lodge of Research #1949 or the official views of the Grand Lodge of Ancient Free and Accepted Masons of Virginia.

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Introduction

Every organization should have a course a direction to follow. Just like a sailboat on the ocean, left alone the boat will drift with the winds and current. But if the captain and officers have a destination in mind and take control of the boat, it becomes a vehicle to a future defined end point.¹

Organizations, particularly volunteer organizations, don't view themselves in competitive markets and, therefore, don't readily recognize the need to engage in strategic or long-term planning and maintain the viability of the organization. The realization for the need to plan and take a different course of direction are often driven by reduced effectiveness, decreases in revenue streams, or decreases in membership.

The Need for a Lodge Health Measure

For the Grand Lodge of Virginia the realizations for strategic planning were initiated, in great part, by sharp decreases in membership and revenues.² In 2003 the Grand Lodge conducted a survey of its membership on issues and problems associated with lost membership.³ Many anecdotal solutions were offered, all based on bias experiences and observations of members and Grand Lodge officers.

In February 2006 the Strategic Planning and Implementation Committee were formed.⁴ The

Grand Master chartered the Committee to assess the current state of the Craft, to identify objectives that could be quantitatively expressed at near, mid and long-range intervals, and also to formulate a long range plan to move our Craft toward desired objectives. Subsequently, the Committee defined the following five strategic objectives.

Objective Number 1. *Strengthen our Masonic cultural norm that behavior is always to be based on Masonic values and standards.*

Objective Number 2. *Develop a tailored program to strengthen the Subordinate Lodges.*

Objective Number 3. *Develop an effective membership development program that attracts a larger number of high-quality candidates for membership*

Objective Number 4 *Develop a community outreach program to improve public understanding and appreciation of Masonic values and contributions.*

Objective Number 5. *Ensure that the DDGM, Grand Lodge Committee and District Team roles and structure are optimized to best support Grand Lodge objectives as well as District and Subordinate Lodge needs.*

The focus of the Strategic Planning and Implementation committee over the following three years, 2007-2009, was focused on

¹ Analogy from R.W. Bradford and J.P. Duncan. 200. *Simplified Strategic Planning*. Chandler House Press.

² R. M. Solomon. 2009. Membership Declines In Freemasonry, Can It Be Explained? Presented at the Perfect Ashlar Council No. 349 meeting on June 30, 2009.

³ Grand Lodge of Virginia Survey. 2003.

⁴ The Strategic Planning committee was chartered by Grand Master Grover Hunter Jones III in February 2006. The strategic objectives spelled out in the Grand Masters remarks on page 20 of the 2006 Grand Lodge Proceedings for 2006.

achieving actions associated with implementing the Strategic Plan. However, few metrics were collected by the Grand Lodge for assessing the desired outcomes with the exception of membership numbers.⁵ At the SP&I Committee meeting in September 2009, the membership committee presented statistics obtained from Lodges as related to membership viability.⁶ At this meeting, the committee discussed the need for long term data to assess how Lodges are doing over a period of time, but deferred decisions.

Developing Metrics for Lodge Health?

How are we doing?

In April of 2010, the Grand Lodge SP&I Committee again took up the question for measuring the health of Lodges within the Grand Jurisdiction of Virginia.⁷

The Committee discussed the use of the Hillman Award as a basis for development of data necessary to address the health of Lodges.⁸ A key question asked by the committee was, "if you had the data, what would you do with it?" The answer to this question was discussed at length. In the end, the committee believed that such data would be used to identify Lodges with the greatest need for support from the Grand Lodge. This information would also be of value in looking at

the direction for the Strategic Plan and adjustment in actions to implement the Strategic Plan.

At this same meeting the SP&I committee undertook the mission of revising the District Deputy Grand Master's Official Visit Report (DDGM OVR).⁹ The question was asked, "Does the DDGM report need to be replaced?." The committee agreed that changes would be necessary, but that such changes needed to be in response to a better understanding of what information the Grand Lodge needs to be better assist Lodges.

At the subsequent July 10, 2010 meeting of the SP&I Committee, a structure for a "Health of the Craft" initiative was proposed and accepted. There were five areas identified as characterization of "Lodge Health."

Membership Health

1. Leadership Health
2. Fiscal Health
3. Ritual Health
4. Education Health

It was generally understood that the adoption of this effort would impact the manner in which some of this information would be collected and that the DDGM OVR may be an appropriate means for obtaining the needed information.

⁵ The SP&I Committee reported progress in implementing actions at the end of year committee reports in 2006 (pages 117-119 of the 2006 Grand Lodge Proceedings) and 2007 (pages 133-135 of the 2007 Grand Lodge Proceedings). In 2008, Grand Master Edmund Cohen devoted substantial treatment to the actions taken in fulfilling objectives in the Strategic Plan, Pages 17-22 of his address to the Grand Lodge.

⁶ Meeting minutes, SP&I Committee, September, 2009. Report by the Services' Committee on progress on applying the Lodge Viability software that provides Lodges with information on membership trends and financial needs.

⁷ Meeting minutes from the SP&I Committee, April, 2010.

⁸ The Hillman Award is an award given to Lodges for achieving objectives in community service, ritual performance, Masonic activities, Masonic education, and Lodge administration. The items within then Hillman award were believed to correlate, in part, with the Lodge Health measures of ritual health, membership health, education health and Leadership health.

⁹ The District Deputy Grand Masters report has traditionally been used to collect information on how lodges were doing at the beginning of the DDGM's term. The information on the reports was a collection of information concerning administrative procedures and Lodge operations. The reports were sent to the Grand Lodge where it could be reviewed by any of the Grand Lodge officers. No consolidated analysis of these reports was ever made.

Most Worshipful Chambliss, (then Deputy Grand Master), asked that matters pertaining to the DDGM OVR be expedited to allow the integration of a Lodge Health Initiative with the DDGM OVR during his tenure as Grand Master. The goal was to have DDGM OVR modified so that the initial data set could be collected in 2011.

Over the course of the following months the DDGM OVR was modified to integrate most of the suggested Lodge Health indices. The revised DDGM OVR used by the DDGMs in 2011 contains information used to set a "baseline" for future years and is the basis for the analysis in this paper (See Appendix A, DDGM OVR).

Development of the DDGM Report

In order to reduce the introduction of new data and elements for a "Lodge Health Index," existing data sources were reviewed for incorporation into the DDGM Report (DDGM OVR). Components of the Hillman Award and objectives of the Strategic Plan along with elements of the previous DDGM Report were reviewed.

Strategic Plan objectives, Numbers 2 and 3 had been the focus of the SP&I Committee over the preceding two years. Therefore, it seemed appropriate that membership and leadership to support subordinate Lodges should be important elements in evaluating Lodge Health. Many of the statistics of Lodge membership are collected and maintained by the Grand Secretary's Office and, therefore, not necessary for reporting in the DDGM OVR. However, membership participation in various Lodge activities and community service projects are important aspects of maintaining membership that are not collected by the Grand Lodge.

Elements of membership participation were integrated into the DDGM OVR. Leadership, Ritual, and Fiscal elements were integrated directly into the DDGM OVR derived, in great

part, from questions in the Hillman Award. The element of education health was not integrated into the DDGM OVR, nor were the elements of "Education Health" identified. Consequently, the element of education health is not currently defined nor are there measures for collecting this information.

Lodge Health Data Base Structure

The initial data base was constructed with an internet input format and the data base resided on a Google server. The input format is simple and has "bound checks" for each of the elements of input. The input elements are answers to the questions in the DDGM OVR, a total of 37 questions. Access to the data base is controlled with user IDs and passwords. There is no limit to the number of users that can have access.

However, before populating this database, the data from 2011 was populated into a Microsoft Access data base for purposes of making format changes and adjustments to report formats and input forms. The current 2011 data base can be transferred to any PC with Access software. The data base, however, is not presently accessible through the Internet Google server. Once the data base structure and reports are established the data can be migrated to the Internet.

The data derived from the DDGM OVR is currently organized into a set of quantitative elements and yes/no elements. The quantitative elements are a continuum of whole numbers as reported in the DDGMs OVR. There are 13 quantitative data elements and there are 24 yes/no elements (see Figure 1). The data is also organized under five general categories (Leadership, Membership activity, Fiscal, Ritual, and Administrative).

What Have we Learned?

Only 234 Lodge were used in this analysis, data for the remaining Lodge have not been provided by the Grand Lodges as of this report date.¹⁰

Category	Viability Tool	Actual Data
Growing	15.3	30
Declining < 25%	26.1	17
Declining 24% -50%	39.2	27
Declining > 50%	19.4	26

The data that was received can be evaluated in a number of different ways to display information: (1) overall performance of all Lodges within Virginia which serves as a bases for trends over time; (2) evaluation of specific Lodge performance, or Lodges within a District, as compared to all the Lodges in Virginia; (3) the performance of a District when compared to other Districts, and (4) Contrasting of different geographical regions (aggregate of Lodges in geographical proximity).

Figure 1. Input Form

The statistics can be viewed for (1) each question in the DDGM OVR, (2) groups of questions for the five categories of measures (i.e., Leadership, Membership activity, Fiscal, Ritual, and Administrative), or (3) an overall integrated index of Lodge health (this last index has not been fully developed).¹¹

Characterizing Lodge Membership

Membership in the United States and at the Grand Lodge level has been decreasing since the early 1960s as reported elsewhere.¹² See Figure 2. But few studies have explored the membership relationships at the Lodge or regional levels. Such analyses can provide informative

¹⁰There are a total of 334 Lodges within the Jurisdiction of the Grand Lodge of Virginia. The sample used for this report constitutes about 65% of the total population of Lodges.

¹¹ Such an integrated index will involve assigning relative weight to each of the measures. Since the list of measures

has not been fully developed, an integrated index is premature.

¹² R. M. Solomon. 2009. Membership Declines In Freemasonry, Can It Be Explained? Presented at the Perfect Ashlar Council No. 349 meeting on June 30, 2009.

information in structuring strategies to implement the Grand Lodge strategic plan.

Some initial analyses were done by the Grand Lodge Service Committee during the years 2008 through 2009.¹³ The results of projections are shown in Table 1. The analysis by the Lodge Services Committee focused on identifying Lodges that may require help in maintaining membership. Subsequent to this analysis, a closer look at Lodge membership statistics was initiated by the Strategic Planning Committee.¹⁴

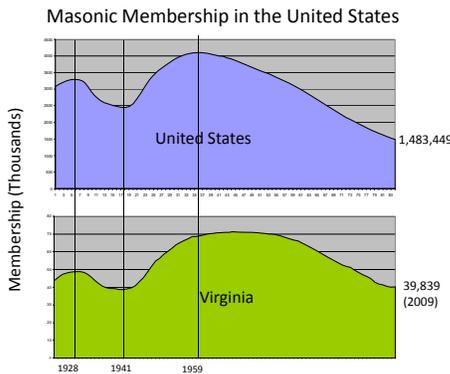


Figure 2. Declining membership within the US and Virginia.

¹³ The Grand Lodge Viability Tool was used to evaluate and make projections of probable lodge membership declines based on Lodge statistics of new members, deaths, demits, etc.

¹⁴ The analysis of membership was initiated in concert with the Lodge Health initiative in April, 2010.

Table 1. Analysis of SVR Tool for the Lodges in Virginia.

GL of VA Membership Analysis
(Based on SVR Tool 20-Year Projection)

	TOTAL		LODGES WITH GROWING MEMBERSHIP		LODGES WITH MEMBERSHIP PROJECTED TO DECLINE BY ~25% IN NEXT 20 YRS		LODGES WITH MEMBERSHIP PROJECTED TO DECLINE BY ~50% BUT ~60% IN NEXT 20 YRS		LODGES WITH MEMBERSHIP PROJECTED TO DECLINE BY ~50% IN NEXT 20 YRS	
	#LODGES	#MEMBERS	#LODGES	#MEMBERS	#LODGES	#MEMBERS	#LODGES	#MEMBERS	#LODGES	#MEMBERS
SMALL LODGE (members ≤ 100)	163	9448	34	1942	40	2317	59	3607	30	1582
MEDIUM LODGE (members 101 to 200)	93	13531	7	998	30	4431	38	5397	18	2705
LARGE LODGE (members > 200)	58	17426	7	1688	12	3332	26	8252	13	4154
Σ	314	40405	48	4628	82	10080	123	17258	61	8441

*Based on 2006 membership stats from the SVR Tool

The membership data used in this analysis spans the time span 2000 - 2009. Comparisons to the Lodge viability analysis done in 2008 shows a slightly different trend in expectations as shown in Table 2.

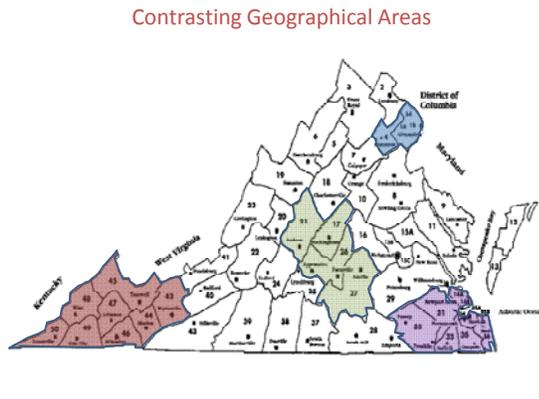
Table 2. Comparison of the projections from the Lodge Viability analysis with actual trends from the years 2000 - 2009.

Because the actual data only spans a period of nine years, it should not be taken as a better estimate for projecting trends in membership losses. The Lodge Viability tool takes into consideration a broader array of variables; including, deaths, affiliations, age distribution of Lodge members as well as raising of new members.

An observation heard among Masons within Virginia is that membership declines and membership numbers differ among various geographical areas within Virginia. To test these observations, four geographical areas were selected for analysis (see Figure 3).¹⁵

¹⁵ The following Districts compose the geographical areas: Northern-- Districts 1A, 1B, 54, and 4; Southwest-- 14A, 14B, 31, 32, 33, 34, 35, 36, and 56; Central -- 17, 21, 25, 26, and 27; Southwest--42, 44, 45, 46 and 48.

Figure 3. Geographical areas used for comparison.



All four geographical areas show declines in Lodge membership. The Lodges within the Northern Region and the Southeastern Region show sharper declines in total numbers and percentages than the Central and Southwestern Regions (see Table 3).

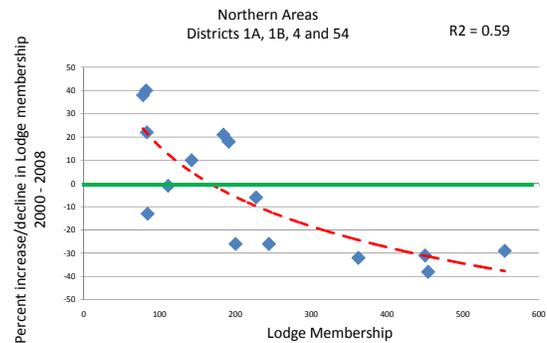
Table 3. Comparison of membership losses among regions.

Geographical Area	Losses in average membership	% losses in membership
Northern	38	16.5
Southeast	34	14.8
Central	11	10.2
Southwest	2	2.8

Comparison of losses among Lodges within a region show some interesting patterns. One might suspect that the loss in membership would be proportional to the total number of members. When we plot the relationship of percentage loss in membership against the total membership of a

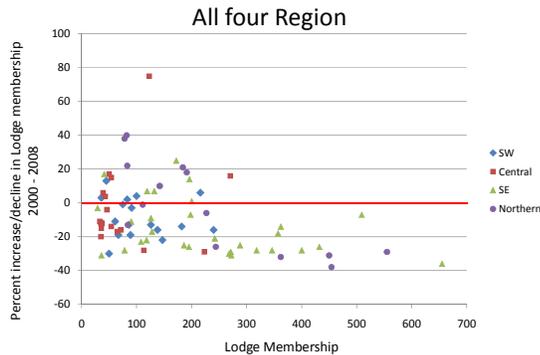
Lodge, we find a significant correlation for the Northern region as shown in Figure 4.

Figure 4. Correlation between percent decline in membership with Lodge membership numbers.



This relationship of percent loss in membership with Lodge membership, however, does not hold up for the other regions as shown in Figure 5. Many additional analyses can be made comparing membership trends among other geographical areas, within Districts or among Lodges. This paper only explores some initial analyses that can and should be done in refining actions to be taken in implementing the strategic plan for the Grand Lodge of Virginia.

Figure 5. Plot of percent loss in membership with Lodge membership for the four geographical areas.

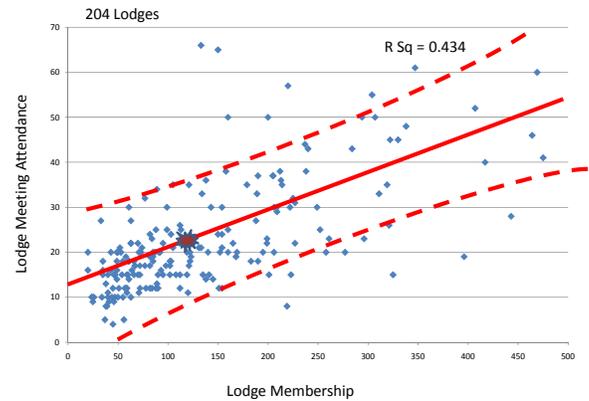


Further Example Evaluations

In addition to membership evaluations, the DDGM Report contains a wealth of information that can prove useful in characterizing Lodge Health. Some examples are provided below.

Not all Lodges can be compared one-against-another for many of the elements in the data base. As an example, one would not expect a Lodge with a smaller membership to have the same level of attendance at stated meetings that you would have for a larger Lodge. One approach is to "normalize" the data by constructing an expected relationship between Lodge memberships and meeting attendance (see Figure 6).

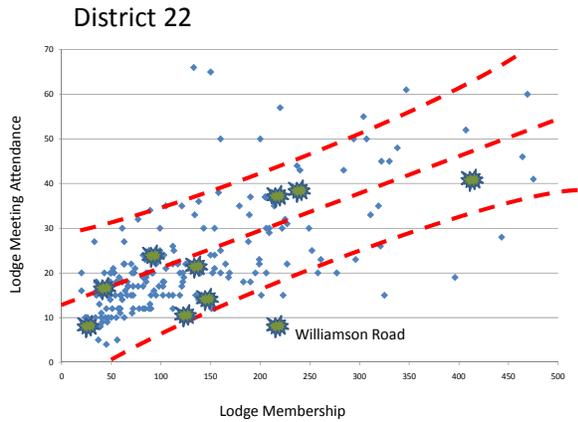
Figure 6. Relationship between Lodge membership and expected meeting attendance.



Each dot in Figure 6 represents a Lodge. The solid straight line can be used as a predictor of what a Lodge of a certain size might expect in way of meeting attendance. The average membership is 135 members and the average attendance is 22. The two dashed lines represent the 90% "band" for attendance. Lodges above the upper band or below the lower band are Lodges deserve further evaluation as to why they have higher or lower attendance than what might be expected.

As a further example, Figure 7 shows how the Lodges within District 22 compare with the expected level. Note the Williamson Road Lodge has a lower level of attendance than what might be expected. Such information can be of use by incoming DDGMs in determining goals, objectives and actions that might be a focus within that District.

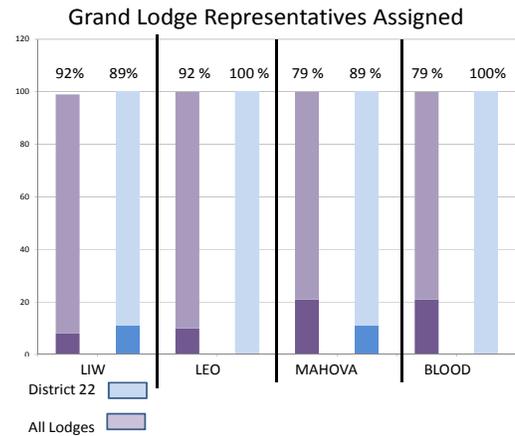
Figure 7. Display of Lodges within District 22 when compared with all the Lodges in Virginia.



For other data elements that are answered on the yes/no scale, one can again characterize how all Lodges compare and contrast with Districts or Regions (groups of Districts). Figure 8 shows how Lodges responded to questions on whether a Lodge had an LEO, LIW, MAHOVA Representative, and Blood coordinator.

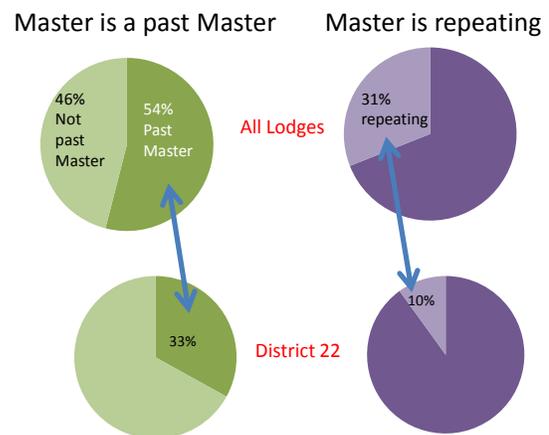
All four of these questions relate to the category of Leadership. In general, over 90% of Lodges in Virginia have an LIW and LEO. The number of Lodges with MAHOVA representatives and blood coordinators is somewhat less, 79%. Note that the Lodges within District 22, in general, have higher levels of these Grand Lodge representatives than Statewide.

Figure 8. Grand Lodge Representatives in Subordinate Lodges.



An example of another area of leadership that provides useful information is the percent of Masters that have previously served as Master, and Masters that are repeating as masters. Figure 5 shows that 34% of current Masters have served as a Worshipful Master in the past and that 31% of Masters are repeating from the previous year. Figure 9 also displays how District 22 compares with other Lodges.

Figure 9. Frequency of Past Masters as Masters and repeating Masters.

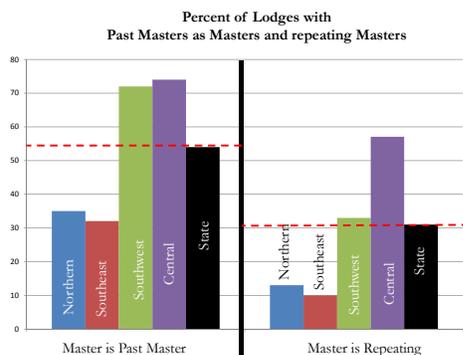


Geographical Area Evaluation

In addition to evaluations at the Lodge and District levels, analyses can be provided by groups of Districts or geographical areas. As an example, groups of Districts were evaluated as shown in Figure 3. These groupings represent Northern, Southeastern, Southwester, and Central regions.

Statistics for each of these areas can contrast trends and characteristics that may be associated with economic, social, or political differences. An example of such comparisons is shown in Figure 10 which contrasts how each Region relied on Past Masters and repeating Masters to run Lodges in 2011.

Figure 10. Contrast of Regions for reliance on past Masters and repeating Masters.



Summary of Evaluations

Strategic planning must be based in data and statistics and not intuition or conjecture.¹⁶ Although many intuitive hypotheses may be supported by actual data, nothing speaks louder than the facts. Use of the DDGM Report, and

¹⁶ L. Goodstein, et. al. 1993. Applied Strategic Planning. McGraw Hill. and R. Bradford, et.al. 2000. Simplified Strategic Planning. Chandler House Press.

¹⁷ District Deputy Grand Masters collect a series of data at the beginning of their term. this information is sent to the

other data gathered by the Grand Lodge, should be closely and periodically evaluated and interpreted for more defensible decisions in implementing and adjusting the Grand Lodge Strategic Plan.

Many more relationships and interpretations, beyond what are given in this paper, can be made and provided to the Grand Line Officers as well as incoming DDGMs. The data and the interpretations can be helpful in adjusting strategic and tactical emphases for the Grand Lodge. Strategic Plan as well as helping incoming DDGMs develop action plans for their District prior to taking office.

Currently the DDGMs collect information during their term, but this information is not communicated to incoming DDGMs in ways that are useful.¹⁷ Providing interpretation of the previous year's DDGM OVRs could be informative to the incoming Grand Lodge Officers and DDGMs for identifying potential problems and needs they may want to address.

Additionally, data must be gathered over a period of years in order to see improvements and deteriorations that can be then be addressed in Grand Lodge policies and actions as well at the individual Lodge level.

This paper presents an initial attempt to characterize data collected by the Grand Lodge and demonstrate how this information may be used in the future. Without hard facts and data, few can be swayed from what they believe to be true. As Francis Bacon best said, "Man prefers to believe what man prefers to be true."

Grand Lodge where it is looked at by a few of the Grand Officers, However, no consolidated analysis of these reports is ever made.

Appendix A. District Deputy Grand Masters Official Report (Example)

REPORT OF OFFICIAL VISIT BY THE DISTRICT DEPUTY GRAND MASTER

R.W. Thomas W. Wilson, D.D.G.M., Masonic District No. 27, Lodge No. 272, Date: 10-10-2011

- PARTICIPATION: 1. Average attendance at meetings in the past 12 months? 55
2. Average length of meetings in the past 12 months? 1:00 (1:15)
3. Number of fraternal visits made in the past 12 months? 2
4. Did the Lodge have a Scout Recognition program in the past 12 months? Yes - No
5. How many service projects did the Lodge sponsor in the past 12 months? 2
6. How many community events did the Lodge participate in over the past 12 months? 2
7. How many Child ID programs did the Lodge conduct in the past 12 months? 2

- LEADERSHIP: 8. Is the Worshipful Master a Past Master? Yes - No
9. Is the Worshipful Master reporting as Master? Yes - No
10. Does the Lodge have a Lodge Instructor of Work? Yes - No
11. Does the Lodge have a Lodge Educational Officer? Yes - No
12. Does the Lodge have a Masonic Home Representative? Yes - No
13. Does the Lodge have a Lodge Blood Coordinator? Yes - No
14. How many Officers/Members completed the Correspondence Courses in the past 12 months? 2
15. Do the Officers attend the Division Leadership Conferences? Yes - No
16. Did the DED make a planned visit to the Lodge? Yes - No

- FISCAL: 17. Does the Lodge have a budget? Yes - No If so, is there a Budget committee in place? Yes - No
18. How many members owe more than 12 months dues? 26 Has personal contact been made with the delinquent members? Yes - No
19. Are the Treasurer's records in good condition? Yes - No
20. Did the Lodge file Form 990-N, Form 990-EZ, or Form 990 last year? Yes - No
21. Did the Audit Committee sign the last report? Yes - No
22. Was the Treasurer's Report available and signed? Yes - No
23. Are the Trustees reconciled with the Circuit Court? Yes - No
24. Does the Lodge own its building? Yes - No Condition of Building (Exterior and Interior) Yes - No
25. Does the Lodge have Property Insurance on the facilities and furniture? Yes - No

- RITUAL: 26. Can the Lodge confer all degrees? Yes - No
27. Can the Lodge deliver the lectures in all degrees? Yes - No
28. Does the Lodge have an adequate number of Catechism Classes? Yes - No
29. Does the Lodge utilize the ENW and/or Division Lectures? Yes - No
30. Did the Junior Warden receive the Degree of Past Master? Yes - No
31. Does the Senior Warden have a Certificate of Qualification? Yes - No
32. Does the Junior Warden have a Certificate of Qualification? Yes - No

- OTHER: 33. Are the minutes of the Lodge signed by the Worshipful Master and Secretary up to the last meeting? Yes - No
34. Are the records of the Lodge properly stored and preserved? Yes - No
35. Does the Lodge have a current copy of the Methodical Digest? Yes - No
36. Does the Lodge have a current edition of the Presentation Volume? Yes - No
37. Does the Lodge have a "List of Lodges Masonic"? Yes - No If so, is it current? Yes - No

Compiled by: [Signature] Secretary Date: 4/16/11
Submitted by: [Signature] District Deputy Grand Master Date: 04/17/2011

The completed form is to be mailed to the Grand Lodge of Virginia, 4113 New Mile Road, Richmond, Virginia 23223-8929 or e-mailed to grandsecretary@grandlodgeofva.org. AEN: 12-20