

DEFINING MASONIC ORGANIZATIONAL EFFECTIVENESS

By

GEORGE J. SAWYER III

Presented to A. Douglas Smith, Jr. Lodge of Research No. 1949

On

March 31, 2018

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 No. 1949 or the official views of the Grand Lodge of Ancient Free and Accepted Masons of Virginia.

DEFINING MASONIC ORGANIZATIONAL EFFECTIVENESS

By

GEORGE J. SAWYER III

Abstract

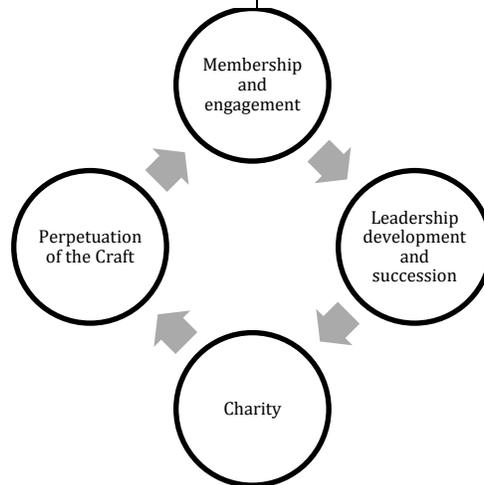
Freemasonry is an ancient and complexly structured organization. This paper briefly surveys the key organizational effectiveness (OE) concepts and how they relate to a proposed study of Masonic organizational effectiveness. The problem of self-serving vs. other-serving is examined and Masonry

is identified (for the purpose of this paper) as a self-serving fraternal society. The use of artifacts is discussed to identify Masonry's theories-in-use vs. its espoused theories. Finally, it is suggested that a formal study of Masonry's organizational effectiveness be conducted.

Keywords: Freemasonry, fraternal organizations, Masons, organizational effectiveness, nonprofits, charitable organizations

We all, intuitively, understand organizational effectiveness (OE). We wake up on Saturday morning with little in our focus than our newspaper and coffee. Soon though, we are reminded of the honey-do list. We spend the day putzing about the house only to arrive at some moment of judgment where we find we have fallen short and X-number of tasks remain

uncompleted or sub-par. Simply stated, organizational effectiveness is “are we doing what we say we are going to do.” This paper is intended to serve as a primer on the academic and pragmatic research on OE and how it might be applied to Freemasonry. My desire is to encourage Masons to apply the discipline of OE to continually improve the Craft.

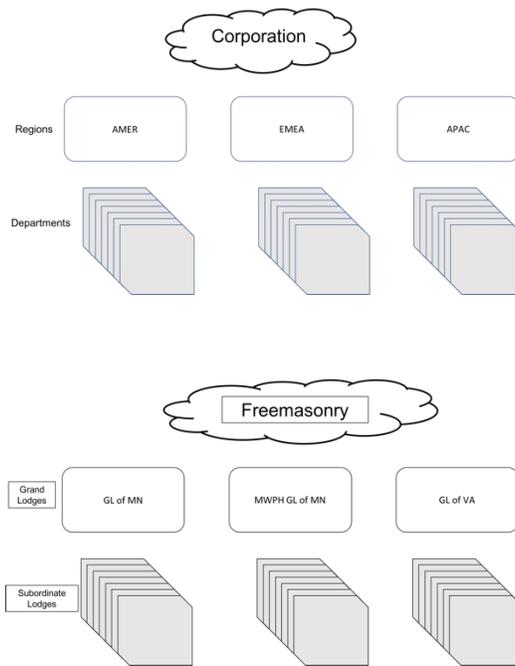


Implications of Organizational Effectiveness

The implications of our ability, or inability, to measure our organizational effectiveness have long-term significance. Let’s say we think the purpose of Masonry is fraternal fellowship and that we are primarily a fraternity of like-minded Brothers. In that case, we want to ask questions about how happy our members are, how engaged they are, and what our recruitment and retention rates are. We would gather these metrics directly from the Brothers via surveys and interviews. On the other hand, if we believe Masonry is primarily a charity, we would measure different metrics. For example, we would want to know what percentage of our contributions is used to assist the needy vs. used for administrative purposes. We might also like to know how much on

average Brothers give and to which kind of charity. Our ability to track and interpret these critical metrics will, ultimately, bear upon the perpetuation of the Craft.

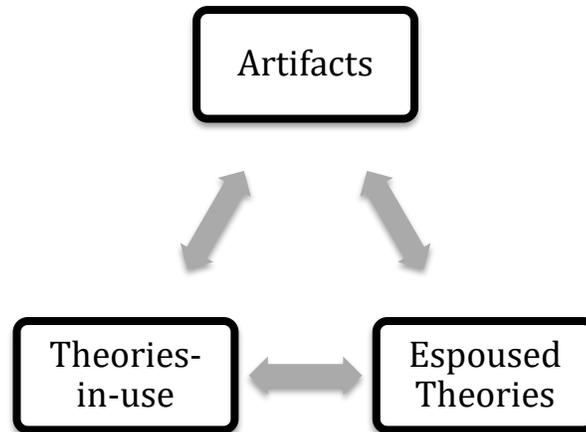
As individuals, we can fairly easily measure our own effectiveness. As we move to organizations, the challenge of measuring effectiveness grows exponentially. Masonry, like many organizations, has several layers and dimensions from which it can be measured by any given metric. For example, when we talk about the organizational effectiveness of Masonry are we talking about the global fraternity, the grand lodge, the constituent lodge, a program within a lodge, or the effectiveness of individual Brothers in their respective roles?



Once we understand the structure of the organization and at what level we are concerned, we can then determine our metric, or thing to be measured. This is no easy task and can be a significant point of contention because it hits at the heart of the question of “who are we and what are we here to do.” Brothers come to the fraternity for many reasons, serve diligently, and derive diverse wages. Some are here with a passion for philanthropy, some seek esoteric light, some receive their

wages through fellowship with like-minded Brothers.

So, what is the purpose of Masonry? What do we “do”? We really can’t begin measuring our effectiveness until we know what we are supposed to be doing and that requires us to answer that tough question. But is there only one answer? Probably not and that’s part of what has made Masonry so effective for so many generations.



In any organization, there are artifacts. Artifacts can be almost anything that the scholar or consultant can use to understand the organization. Some of the most common artifacts are the building and furnishings, reports, mission statements, standard operating procedures, titles, stories, rituals, etc.

Argyris (1999) and Argyris and Schön (1996) discuss espoused theory (or values) vs. theories-in-use to help understand organizations that learn and those that do not. Espoused theories are those things we believe about ourselves. For example, we believe we are an esoteric gathering of men who, in our helping of other men, become better ourselves. Theories-in-use is what we actually do. For example, our actual Lodge meeting might be consumed discussing how much we need to make at our pancake breakfast next month to pay for the new carpet.

So what would an OE study of Masonry look like? A consultant, sitting in our Lodge would see the esoteric symbols (artifacts) and read our mission statement (another artifact) that says we make good men better (an espoused theory). He would then hear our discussion of the pancake breakfast and

the heated debate over which quality of carpet we can afford. He would then conclude that our espoused theories are not put into practice but, rather, we are governed by our theories-in-use. What we really value is carpet.

But Who Are We?

Masonry appears to have, not one, but two distinct purposes. First, Masonry exists as a philanthropic organization raising money for many community organizations as well as running many large charitable organizations of our own. For example, the MN Grand Lodge's flagship charity is the University of Minnesota Masonic Children's Hospital for which the Grand Lodge of MN raises a substantial sum of money annually (University of Minnesota Physicians and University of Minnesota Medical Center, 2014). This aspect of Masonry places the institution squarely in the category of most other nonprofits and would suggest effectiveness measures normally applied to that category would also apply to Masons. However, Masonry has a second distinct purpose which is called out in the IRS designation of "fraternal societies" (Internal Revenue Service, 2017). Masonic organizations exist equally, if not primarily,

to serve their membership fraternally. So are we self-benefiting? Or other-benefiting? The definition of what it means to serve a membership fraternally would certainly be a more complex task than can be addressed by this brief overview. However, the distinction between Masonry's philanthropic and its fraternal purposes will have a critical impact on any formation of a workable framework or model of organizational effectiveness for the organization.

To keep this paper reasonably focused, I'll make an assumption to start us off: we are self-benefiting. How did I come to that? The mission statement of The Grand Lodge of Virginia (The Grand Lodge of Virginia, 2018) says that the Grand Lodge exists to "teach and perpetuate a way of life" and "assist Lodges to grow and prosper." The Grand Lodge may do many other noble things but this is what it espouses. Based solely on what can be distilled from the mission statement, the Grand Lodge is self-benefiting. Indeed, a brief scan of other Grand Lodge statements reveals a similar focus. We are, at least in one sense, self-benefiting.

The well-indoctrinated Mason should probably react viscerally to this. "No, I am not the focus. The focus should be on the poor, the uneducated, the less privileged." And, while this is a good and noble position, it may not be who we are, and who we are may be for a very good reason.

So, let's ask this again. Are we a corporation? A Nonprofit? Or something else? Can we come to grips with the notion that we exist only for ourselves? And I mean that in the plural. For ourselves...each other. To make good men better. To build each other up? To educate...each other. To assist...each other. This is who we are and what we do and what we should demonstrate we can do effectively, which is the topic of this paper. This said, keep in mind that we may have other things we do that must be measured. While our philanthropic endeavors are not to be dismissed, they are simply not in the scope of our current discussion. What we learn here, however, will certainly impact them.

Stages of Life



Just like in human life, organizations have stages of life. Even if we assume the most conservative founding date, it's an extremely rare few that have ever lived the full, long life that Masonry has. Schein (1992) describes three stages of an organization's life:

founding (first two generations), midlife/maturity, and decline. As an organization, we would be considered in decline when our market is saturated or our products obsolete. So where is Masonry? We are clearly far beyond the founding phase but are we in decline?

Like our own lives, it's usually pretty hard to determine. If we assume we are in midlife, we live very differently than if we are in decline? Should we get the Mustang or update our will? It's best to live as if we were in decline, assuming now is the time to consider our legacy. We are taught from our earliest degree to consider our mortality. It isn't fatalism, it isn't defeating, it's focusing. Keep focused on what matters...who matters.

How is Organizational Effectiveness Measured?

The literature on organizational effectiveness is extensive and represents many approaches to a wide variety of challenges across the spectrum of organizations. As a discipline, organizational effectiveness has had a long life (Forbes, 1998) yet little consensus has been achieved in either the definition (Cameron, 1986) or methodologies for assessing organizational effectiveness. Additionally, the academic literature on the construct of organizational effectiveness represents studies done, primarily, with for-profit corporations within North America (Harrison & Shirom, 1998).

So how do we measure OE? We aren't really sure. When I say we don't know, what I mean is that there are many theories but no single one has been found to be *the* answer. Still, many theories and methodologies have been found to be extremely helpful when used in the right way for the right organization. For example, Herman and Renz (2008) suggest that an

organization's responsiveness is an accurate measure of effectiveness in non-profit organizations. Choosing the correct measures is a complex process in itself and often many things must be measured and interpreted. Ultimately, as we learned earlier, what we measure will be driven by what we believe we should be doing.

Moving to Action

Of course, the point of this primer was to move us to some action. Now, armed with some rudimentary theories and perhaps a bit of curiosity, what are the next steps? As we saw, the steps to measuring OE begin with defining who we are and what we believe we should be doing. Next, we must ask what metrics we should use to determine our effectiveness. Finally, we must collect data and interpret it. Simple, right? Currently, there are no known academic studies of Masonic organizational effectiveness. Grand Lodges and appendant bodies, particularly Scottish Rite, have done various assessments of their own organizations. However, these assessments have not been scrutinized to determine if the initiatives have, themselves, been effective. Nor have these efforts been propagated to the wider Fraternity (with the exception of the Scottish Rite to its Valleys).

A formal and systematic study of Masonic organizational effectiveness would help participating Lodges and Grand Lodges celebrate their successes in leadership development and better align their espoused theories with their theories-in-use.

References

- Argyris, C. (1999). *On organizational learning* (2nd ed.). Malden, MA: Blackwell Publishing.
- Argyris, C., & Schön, D. A. (1996). *Organizational learning II: Theory method and practice*. New York, NY: Addison- Wesley.
- Cameron, K. S. (1986). Effectiveness as paradox: Consensus and conflict in conceptions of organizational effectiveness. *Institute of Management Sciences*, 32(5), 539–553.
- Forbes, D. P. (1998). Measuring the unmeasurable: Empirical studies of nonprofit organization effectiveness from 1977 to 1997. *Nonprofit & Voluntary Sector Quarterly*, 27, 183–202.
- Harrison, M. I., & Shirom, A. (1998). *Organizational diagnosis and assessment: Bridging theory and practice*. Thousand Oaks, CA: SAGE Publications.
- Herman, R. D., & Renz, D. O. (2008). Advancing nonprofit organizational effectiveness research and theory: Nine theses. *Nonprofit Management and Leadership*, 18(4), 399–416.
doi:<https://doi.org/10.1002/nml.195>
- Internal Revenue Service. (2017). Fraternal societies.
- Schein, E. H. (1992). *Organizational culture and leadership* (2nd edition). San Francisco, CA: Jossey-Bass.
- The Grand Lodge of Virginia. (2018, March 24). About the Grand Lodge of Virginia: Mission & Vision. Retrieved March 24, 2018, from <https://grandlodgeofvirginia.org/about/>
- University of Minnesota Physicians and University of Minnesota Medical Center. (2014, October 14). Masonic Charities' giving to University of Minnesota exceeds \$125 million. Retrieved January 22, 2019, from <https://www.mhealth.org/blog/2014/october-2014/masonic-charities-giving-to-university-of-minnesota-exceeds-125-million>

