Lodge: No. \_\_\_\_\_\_\_ District \_\_\_\_\_\_\_

Located at: \_

The Grand Master appoints District officers, with important responsibilities for building a vibrant fraternity. Under the leadership of the DDGM the officers in a District need to work as a team, endeavoring in their respective areas of responsibility to enrich Freemasonry, as well as the value of membership in District Lodges. They are also charged with the responsibility for assisting Lodge officers and assessing Lodge performance. Many aspects of the Lodge’s operations are to be reviewed when assessing the overall strength of a Lodge, to include its leadership, planning, finances, meeting facilities, ritual delivery, Masonic education programs, community involvement and, most importantly, the perceived **Value of Membership** as exemplified by member involvement in Lodge meetings, fraternal and social activities, and other opportunities for fraternal relations and personal growth.

**Form 1** has 4 Tables to assist with completing the overall assessment.

**Table A** Is to be filled out by the lodge officers prior to the night of the DDGMs official visit. It is signed by the Master and Secretary of the lodge. The completed table A is to be given to the DDGM when he arrives the night of his official visit. He will spot check some of the items on table A prior to the meeting but he will not go through every item on the form.

Reviewing table A in advance may assist the lodge in planning, setting up committees and organizing lodge activities. Some lodges may find the completed table A helpful in preparing their annual history report, to Grand Lodge and may choose to share it with the lodge members. Members that have been away for some time often find it interesting to see what their lodge is doing.

Lodges should look at the last section of Table A as a way to let the DDGM and Grand Lodge know what a truly wonderful fraternal and community organization their lodge is. Lodges should feel free to extend that part of the form with additional sheets as needed.

**Table B** Will be filled out by the DDGM the night of his official visit before and after but not during the lodge meeting.

It will be reviewed privately with the Master and Wardens of the Lodge after the meeting is closed.

**Table C** Will be completed the night of the official visit. It should be completed by the DRI or may be delegated to a past master at the meeting by the DDGM if the DRI is not present. It will be reviewed by the DDGM after the meeting but not during.

**Table D** Is to be filled out by the DER It may be filled out the night of the official visit or maybe filled out at another time. Table D is forwarded by the DER to the chairman of the MEALS Committee and a courtesy copy is provided to the DDGM

**Table E** Provides guidance for the DDGM filling out Table B. It may be used by the lodge for planning and preparing for the official visit.

**Table A**

Lodge: No. \_\_\_\_\_\_ District \_\_\_\_\_\_\_

Located at: \_ Official Visitation on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_

**Lodge Inspection Summary**

|  |  |
| --- | --- |
| Bills are approved by the Master and the Committee on Finance before being paid.  | [ ]yes [ ]no  |
| Accounts of the Lodge are audited annually by the Finance Committee.  | [ ]yes [ ]no  |
| The annual reports of the Lodge were spread in full upon the records.  | [ ]yes [ ]no  |
| The Lodge has a “current” copy of the “List of Lodges, Masonic” otherwise known as the Tyler’s Book. It is dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  | [ ]yes [ ]no  |
| There have been changes to the by-laws during the past year.  | [ ]yes [ ]no  |
| The by-law changes were properly presented to and voted upon by Lodge members, and approved by Grand Lodge.  | [ ]yes [ ]no  |
| At least the elected officers have an up-to-date version of the approved Lodge by-laws. | [ ]yes [ ]no |
| The Lodge has four up-to-date copies of the Grand Lodge Constitution and Standing Regulations in the hands of the Master, Sr. and Jr. Wardens, and Secretary. | [ ]yes [ ]no |
| The Lodge and, if applicable, the Building Association have filed the 990 report. (Request to see the filed report and record the tax ID number on the next page) | [ ]yes [ ]no |
| Was the Lodge represented at the last Annual Communication? By Officers? 🞎 Proxy? 🞎 (Sec. 2.2-1) |  |
| Was the last Annual Return filed on time? (Sec. 75.1)Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Per Capita Included? Yes 🞎 No 🞎 | [ ] yes [ ] no |
| Was the Lodge History filed on time?(Sec.75.3) | [ ] yes [ ] no |
| Was Certificate of Installation of Officers filed immediately? (Sec.75.4) | [ ] yes [ ] no |
| Was an Official Form 7 attached to each Petition for Degrees & Application for Affiliation before being assigned to the Committee of Inquiry? | [ ] yes [ ] no |
| Does the Lodge update the Grand Lodge Database on a regular basis?Official Form 15? 🞎 MORI electronic database? 🞎  |  |
| Did each new Master Mason receive a diploma and dues card at the time of Raising? ) | [ ] yes [ ] no |
| Did each new member sign the By-Laws when they were raised or affiliated? | [ ] yes [ ] no |
| Were members suspended for NPD notified of possible suspension by letter or personal contact? (Sec. 58) Attach a copy of the letters sent. | [ ] yes [ ] no |
|  |  |

# Table A (Continued) Lodge \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ No. \_\_\_\_\_\_\_\_\_\_

Lodge Tax I.D. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Tax form last filled

Building Assn. Tax I.D. Date Tax form last filled

|  |  |
| --- | --- |
| # Of **Stated** Communications held during the past twelve months | \_\_\_\_\_\_\_\_\_ Average Attendance \_\_\_\_\_\_ |
| # Of **Special** Communications held during the past twelve months | \_\_\_\_\_\_\_\_\_ Average Attendance \_\_\_\_\_\_ |
| Number of meetings attended by:Master |  |
| Senior Warden |  |
|  Junior Warden |  |
|  Secretary |  |
|  Treasurer |  |
| Lodge **income** during the most recently completed fiscal year |  |
| Lodge **expenses** during the most recently completed fiscal year |  |
| Amount in Charity Fund at the end of the most recent fiscal year | $ |
| Amount expended for **relief** during year | $ |
| Amount expended for **charity other than relief** | $ |
| Fees for Degrees (**Total** amount **the candidate** pays for all three degrees, including the initial application fee and the $5 paid for the George Washington Masonic Memorial): | $ |
| Amount charged for annual dues? | $ | Does this amount include the Grand Lodge per capita and related assessments? | [ ]yes [ ]no |
| Total amount of dues outstanding: | $ |
|  Amount outstanding in current year dues | $ |
|  Additional amount owed for one year in arrears | $ |
|  Additional amount owed for two or more years | $ |
| Lodge Building owned by   |  |

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Lodge Master Lodge Secretary

# Table A (Continued) Lodge \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ No. \_\_\_\_\_\_\_\_\_\_

Activities the lodge has done during the year

 Estimated total volunteer hours per month (for all lodge brethren) \_\_\_\_\_\_\_\_\_\_

Type of Activity Month(s) Purpose/Beneficiary Number of Brothers
*[fundraiser/community event]* *[examples; Youth Activity/Cancer Society]*

Add additional sheets as required

**Table B**

Lodge: No. \_\_\_\_\_\_ District \_\_\_\_\_

Located at: \_ Official Visitation on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_

**Lodge Inspection Summary (This Page Is To Be Submitted To The Grand Lodge)**

|  |  |
| --- | --- |
| The Charter and/or Certificate of Charter were present and are properly maintained.  | [ ] Yes [ ] No  |
| The books of the Secretary were present and are well maintained. | [ ] Yes [ ] No  |
| The books of the Treasurer were present and are in order. | [ ] Yes [ ] No  |
| Did the Lodge demonstrate their ability to convey the Masonic Tenets, Virtues, Morals and Insights contained in the Ritual in a manner intelligible to the Candidate | [ ] Yes [ ] No |
| Was the Master Present in the East | [ ] Yes [ ] No |
|  |  |

**Lodge Assessment Summary**

|  |  |  |
| --- | --- | --- |
| **Lodge Review Factor** | **Reviewer** | **Rating \*** |
| Lodge leadership and operations | DDGM |  |
| Lodge vision and planning (including Excellence Award) | DDGM |  |
| Ritual proficiency: words, delivery, floor work, education | DRI/DDGM |  |
| Candidate and membership development & retention | DDGM |  |
| Lodge education programs and participation in Grand Lodge and Maine Masonic College education programs | DER |  |
| Fraternal and social programs | DDGM |  |
| Community presence and charity | DDGM |  |
| **OVERALL LODGE RATING** |  |  |

**\* Use a scale of one to ten, ten being the best**

**The DDGM’s overall evaluation of the Lodge is based upon the following observations:**

**Recommendations, if any, for consideration by Grand Lodge officers, committees and related bodies:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

District Deputy Grand Master District Date

**Table C**

Lodge: No. \_\_\_\_\_\_ District \_\_\_\_\_\_\_

Located at: \_ Official Visitation on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_

**DISTRICT RITUAL INSTRUCTOR ASSESSMENT**

## Over all Evaluation of the Ritual Presentation and Related Education

**Ritual \_\_\_\_\_\_\_ Floor Work \_\_\_\_\_\_\_ Education \_\_\_\_\_\_\_ OVERALL Rating \_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| Ritual generally delivered by line officers without feeling and with numerous errors and frequent promptingPast Masters or guest officers often fill in by holding primary offices during the first section and by delivering lectures and chargesCandidates are not instructed in the meaning of the ritual or its application to their livesThe Lodge does not have an Education officer, and does not use the Ritual Instructor’s Manual, Pollard Plan booklets and candidate instructional videos | Ritual generally delivered by line officers with some errors and promptingPast Masters or guest officers occasionally fill in by delivering lecturesThe Lodge regularly uses at least one of: the Ritual Instructor’s Manual, Pollard Plan booklets or candidate instructional videosEducation officer not assigned but Lodge officers and members strive to provide a moderate level of ritual related education | Ritual is delivered by line officers with great feeling and minimal errors or promptingThe source and meaning of sections of the ritual, and their application to a Mason’s life are regularly explained when holding candidate lessons and during Lodge meetingsThe Lodge has an Education officer, and uses the Ritual Instructor’s Manual, Pollard Plan booklets and candidate instructional videos |

|  |
| --- |
| The Lodge has worked \_\_\_\_ EA \_\_\_\_ FC \_\_\_\_ MM candidates during the past 12 months. |
| I have observed degree presentations during the past year. The work has generally been rated as: **[ ] Needs Improvement [ ] Average [ ] Strong** |
| The Lodge has invited the District Ritual Instructor to the Lodge for ritual instruction and education \_\_\_ times during the term of the current Master / during the past 12 months.**NOTE:** If the Lodge has invited the District Ritual Instructor to assist two or more times on degree rehearsals during the past 12 month, the rating of **Ritual Work** may be increased by two (2) grades (*e.g.,* from a 6 to an 8). |

Rating based upon the following observations

 **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

 DRI District Date

**Table C Cont.**

**District Ritual Instructor’s Assessment of the Annual Visitation**

|  |
| --- |
| The elected and appointed officers conferred the \_\_\_\_\_\_\_\_\_\_\_\_ degree rated by the DDGM |
| If no, what positions were substitutes?**[ ]**WM, **[ ]**SW, **[ ]**JW, **[ ]**SD, **[ ]**JD, **[ ]** SS, **[ ]** JS, **[ ]** MAR,**[ ]** CHAP, **[ ]** Lecture, **[ ]** Charge. |

### Reception of the DDGM and Lodge Opening

1. The DDGM is properly received into the Lodge and accorded appropriate honors.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

2. The formal opening of the Lodge is correctly done with minimal ritual errors.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

3. If work is in a degree other than the Master Mason, the Lodge is called from the higher degree to the lower degree and back up again at the end of the degree work in accordance with page220 of the cipher (2010 edition).

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

4. The candidate was properly prepared and clothed for the degree in a room that was neat and orderly. Proper ritual was used from memory during his presentation to the SD.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

5. The candidate was properly examined and received into the Lodge by the Senior Deacon.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

6. The circumambulations and examinations by the JW, SW and WM were done proficiently.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

7. The candidate received proper instruction from the SW for advancement to the altar and proper positioning to receive his obligation.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

**Table C Cont.**

8. The candidate is placed in proper position at the altar by the SD to receive his obligation.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

9. The obligation is given clearly, with feeling, and with minimal ritual errors.

**[ ]** Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

10. The demonstration of the due guard and sign by the WM is done correctly.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

11. The WM and SD give proper instruction in the grip and word and the candidate is properly instructed on entering or retiring from an open Lodge.

**[ ]** Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

12. The second section is conducted in a solemn and dignified manner with the appropriate demeanor.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

13.The lectures and charges are given by the officers/members of the Lodge being inspected.

**[ ] Yes**  **[ ] No**

*Comments:*

14. The lectures and instructions to the candidates are given clearly and with feeling.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

15. Prayers by the Chaplain are delivered proficiently, clearly, and with feeling.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

16. The charges to the candidate are given proficiently from memory and with feeling.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

17. The Officers closed the Lodge properly.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

**Table C Cont.**

## Over all Evaluation of the Ritual Work

The work was done in a way that makes a meaningful and lasting positive impression upon the candidate. The work was conducted in a manner that conveyed the deep spiritual meaning of the degree being conferred.

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| At least 7 ofthe17 items rated as needs improvement and not more than two are rated strong. | At least 10 ofthe17 items were rated average or strong, not more than three are rated as needs improvement. | At least10ofthe17 items were rated strong, and none are rated as needs improvement. |

The rating is also based upon the following observations made during the review period.

## Floor Work

1. Floor work indicates that there have been rehearsals and officers worked well together. Officers and members do not pass between the altar and the East except in perambulations.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

2. All floor work is conducted in a dignified manner and has a positive effect on the presentation of the lessons taught in the degrees.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

**Overall Evaluation of the Floor Work**

**[ ]**Needs Improvement(1-3) (*Both items rated needs improvement*)

**[ ]**Average (4-7)(*Both items rated average or one item rated strong*)

**[ ]**Strong (8-10)(Both *items less than strong*)

**Ritual Education Rating**

1. The candidate exemplified in open Lodge with the assistance of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ his questioner. Both the candidate, and the participating officer or member (who did not read questions),were well prepared for the exemplification.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

2. The Lodge employs the Ritual Instructors Manual, Pollard Plan Booklets and degree videos to instruct the candidate on the degree lessons.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

3. The Lodge instructs the candidates and other Brethren on the meaning of symbolism, allegory and ritual of the degrees and their relevance to the lives of men.

**[ ]**Needs Improvement **[ ]**Average **[ ]**Strong

*Comments:*

**Table C Cont.**

## Over all Evaluation of the Candidate’s Ritual Related Education

The ritual related educational program work was conducted in a manner that conveyed the deep spiritual meaning of the degree being conferred.

**Ritual related education Rating**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| Ritual is delivered with little to no follow-up instruction on the meaning of the ritual, symbolism and allegoryNone of the MEALS produced instructional tools are usedNo mentor is provided to the candidate and he is not taken to other Lodges to witness the degreesLodge does not speak on the Rookie Award | So me education is provided on the meaning of the degree lessonsOne of the MEALS produced instructional tools is usedA mentor is provided to the candidate who provides some guidance, or the candidate is taken to other Lodges to witness the degrees and given some instructionLodge speaks on Rookie Program but does not actively assist new Masons in pursing completion of the award | An effective educational program is accorded the candidates, either in person or in open LodgeAt least two of the MEALS produced instructional tools are usedA mentor is provided to the candidate by the time of the First Degree and he is taken to other Lodges to witness the degrees and given additional instructionLodge members actively encourage and assist new Masons to complete Rookie Award requirements |

Rating is also based upon the following observations :

 **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

 DRI District Date

Lodge \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_ District \_\_\_\_\_\_\_\_\_\_

**Table D**

Lodge: No. \_\_\_\_\_\_ District \_\_\_\_\_\_\_\_

Located at: \_ Official Visitation on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_\_

**District Education Officer Assessment**

**To be Completed by the DER, and provided to the Chairman of the Masonic Education and Lodge Services Committee with a courtesy copy to the DDGM**

This assessment is to consider whether the lodge offers or arranges for informative educational programs for members and candidates on a variety of Masonic and leadership subjects. Please note that educational initiatives to teach Masonic lessons associated with degree ritual, allegory and symbolism is to be assessed by the District Ritual Instructor and is included in that portion of the Lodge’s evaluation. However, this ritual related assessment is also an important component of the District Education Representative’s consideration of candidates for the Raymond Rideout Award.

**Lodge education programs and participation in Grand Lodge and Maine Masonic College education programs – District Education Representative Rating \_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| No or minimal educational opportunities for membersThe Lodge has neither offered to host nor encouraged officers and members to attend Maine Masonic College / Dirigo Leadership coursesThe Lodge does not request and is not receptive to the DER presenting instructional programs before or during Lodge meetingsThe Lodge members are not urged to lead discussions and write articles on Masonic history, protocol and symbolismThe Lodge does not use the Ritual Instructor’s Manual and other candidate instructional videos to educate candidates and members on Masonic principles and lessons. | Moderate level of educational opportunities are afforded membersA few Lodge members have attended Maine Masonic College / Dirigo Leadership coursesThe Lodge occasionally requests / allows the DER to present instructional programs before or during Lodge meetingsThe Lodge members have led discussions and written / presented papers on Masonic history, protocol and symbolismThe Lodge occasionally uses the Ritual Instructor’s Manual and candidate instructional videos to educate candidates and members on Masonic principles and lessons | Strong educational opportunities for membersThe Lodge has hosted / has asked to host one or more Maine Masonic College / Dirigo Leadership coursesLodge members are encouraged to and often attend available courses (above)The Lodge regularly requests the DER to present instructional programs before or during Lodge meetingsLodge members are urged to lead discussions and write articles on Masonic history, protocol and symbolismThe Lodge regularly uses the Ritual Instructor’s Manual and candidate instructional videos to educate candidates and members on Masonic principles and lessons |

**Table D Cond.**

Rating based upon the following observations **(Also factor in the separate assessment conducted by the District Education Representative for the Raymond Rideout Award)**:

 **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

District Education Officer District Date

**Table E**

**Lodge leadership and operations – DDGM Rating \_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| Conflict apparent among officers / members. Several line officer chairs unfilled and others held by Past MastersOfficers do not chair various committees while ascending the lineNo meeting agenda; Master always defers to the SecretaryNo officer meetingsUnable to have Lodge social, fraternal and fundraising activities due to the lack of planning or volunteers No or minimal financial planningViolations of bylaws and ConstitutionLodge never or seldom represented at District officer meetingsGL / State / IRS reports and bill payments constantly late No incorporated building association for Masonic-owned propertyLodge & building association sharing tax IDLodge meetings and events not added to the District calendarMany officer email addresses have not been added to MORIOfficers and members do not appear aware of proper Masonic protocol | Most officers work well together yet are not clear on their duties and responsibilitiesMostly first time line officersOfficers sometimes serve on committees while ascending the lineSecretary prepares HIS agenda with minimal input from the Master Some officer meetings, but often bring up the same issues and usually deal with near term activities Struggle to get volunteers for Lodge activitiesSome weaknesses in Masonic protocolRough annual budget and assessment of future financial needs GL / State / IRS reports and bill payments sometimes late Sometimes represented at District officer meetingsSome Lodge meetings and events are added to the District calendarMost officer email addresses have been added to MORIOfficers and members frequently vary from proper Masonic protocol | Officers work well together, agree on the vision and priorities; are well grounded on their responsibilitiesOfficers chair or sit on social, adm. and building committees while ascending lineMaster leads the meeting with HIS agenda developed with the SecretaryGood officer knowledge of Constitution and Lodge bylaws Regular officer meetingsAll line officers have job descriptionsAmple volunteers for Lodge activitiesStrong exemplification of proper Masonic protocolGL / IRS reports and bills handled in a timely mannerRegularly represented by one or more officers or members at District officer meetingsLodge meetings and events are added to the District calendarAll officer and many member email addresses have been added to MORILodge uses MORI for monthly reporting and dues processingAnnual Lodge budgeting and financial planningBuilding Assn is incorporated and has separate Tax ID |

**Table E cont.**

**Lodge vision and planning (including Excellence Award) – DDGM Rating \_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| Lodge is not pursing the Excellence Award; has not developed a vision for itself, a self-improvement plan or an activities scheduleOfficers are unaware of member interests and District / Grand Lodge assistance and resources availableThe Lodge does not develop an operating budget and has not identified opportunities and needs, as well as financial and other threats to long-term Lodge viabilityLodge essentially runs from meeting to meeting without long-term directionOfficers and members do not seek assistance in plotting a course forward | Lodge officers prepare and follow a skeletal annual plan (schedule) of activities Periodic officer planning meetings are heldLodge officers and members are interested and willing to invest time and resources to strengthen the Lodge and address its challenges and threatsThe Lodge is discussing its future as well as options and priorities to **add Value** to being a member of the Lodge as well as the Lodge being an important part of the community | Lodge is eagerly pursing the Excellence AwardLodge officers and members have a strong sense of a desired future direction of the LodgeStrategies and priorities have been established (with input from the membership) and resources allocated to strengthen multiple aspects of Lodge operations and activitiesOfficer planning meetings are regularly held to schedule activities, assign officer and committee responsibilitiesLodge optimizes participation in District-wide planning and schedulingThe Lodge has identified financial needs and developed fundraising programs and other financial solutions, including the use of Charitable Foundation grants |

Table E cont.

**Candidate and membership development & retention – DDGM Rating \_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| The Lodge does not have an organized approach to attract good men to the CraftThe Lodge does not assign mentors to candidates and new members Candidates are not told about, encouraged to pursue, or assisted in competing the Masonic Rookie AwardThe Lodge does not reach out to non-participating membersLittle personal or formal communication with membersMinimal visitation of shut-in and other non-attending BrethrenLittle outreach before suspending a member for NPD | A few Lodge members periodically hold a fellowship night or other membership development activities on a Lodge or District basis, but there is minimal activity to regularly identify and pursue men of good report who might be interested in MasonryThe Lodge has a base-line mentoring program and often takes new Masons to visit other LodgesSome candidates pursue the Masonic Rookie Award but more member support neededOfficers sometimes reach out to members but not enough done to avoid suspending members for NPD | The Lodge regularly holds effective fellowship nights or other membership development activities that involve many Lodge members; potential candidates are invited to suppers, non-ritual educational programs and social eventsThe Lodge has an effective mentoring program Candidates regularly **complete** the Masonic Rookie AwardActive personal outreach to inactive Brethren and those subject to possible suspensionProspective members invited to dinners and social activities |

Table E cont.

**Fraternal and social programs – DDGM Rating \_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| The Lodge is cold and unwelcoming to visitors and even its own BrethrenMembers tend to think that Masonry is a “a man’s organization” and does not offer programs for ladies, widows and childrenLodge does not host its own or participate in District fraternal, fundraising and social activitiesLodge does not travel as a body to other Lodges and Districts | The Lodge welcomes visiting Brethren and members enjoy being in each other’s company Lodge officers and members sometimes participate in District activitiesLodge members occasionally travel to other Lodges and DistrictsLodge occasionally holds a program for ladies, widows or childrenThe lodge host at least one family event each year. | The Lodge is known for its strong fraternal relations, its practice of brotherly love and affection Brethren enjoy being in each other’s company Lodge actively helps to plan and participate in District activitiesLodge travels as a body to other Lodges and DistrictsLodge hosts Table Lodges and other social and fraternal activitiesThe lodge holds multiple family eventsLodge has an active program for ladies, widows and children |

Table E cont.

**Community presence and charity – DDGM Rating \_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Needs Improvement (1 – 3)** | **Average (4 – 7)** | **Strong (8 – 10)** |
| The community is generally unfamiliar with the presence and activities of the Lodge The Lodge does not participate in community fairs, eventsFew Members are active in municipal government, public safety, religious and social organizationsThe Lodge does not involve itself in town activities and does not employ any of the four Charitable Foundation grant programs The Lodge does not involve itself in addressing the needs of the community and its citizens | The community is generally aware of the Lodge but does not consider it important to the fabric of societyLodge participates in some community fairs, eventsMembers are active in municipal government, public safety, religious and social organizationsThe Lodge utilizes Charitable Foundation grant program Lodge assistance is low key and is usually confined to only those associated with the Lodge | The community considers the Lodge as being vital to the fabric of societyThe Lodge actively participates in community fairs, eventsMembers are active in municipal government, public safety, religious and social organizationsThe Lodge utilizes multiple (at least two) Charitable Foundation grant programs The Lodge regularly assists people and organizations in need of help and makes the Lodge hall available for other organizations and fundraising efforts |