



Coachella Lodge 476

5 Year Strategic Plan

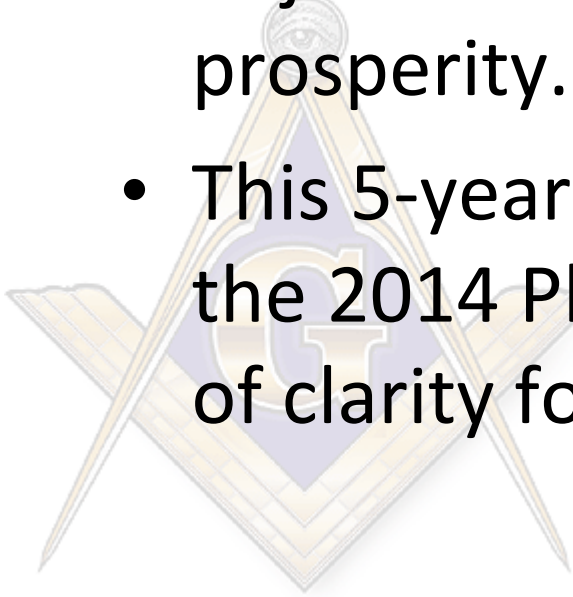
2017 - 2021

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Purpose

- To create a living document to help and guide the Lodge into the foreseeable future addressing both short-term and long-term objectives to ensure Lodge harmony and prosperity.
- This 5-year plan, in many aspects, emulates the 2014 Plan, but it provides a greater level of clarity for its implementation.

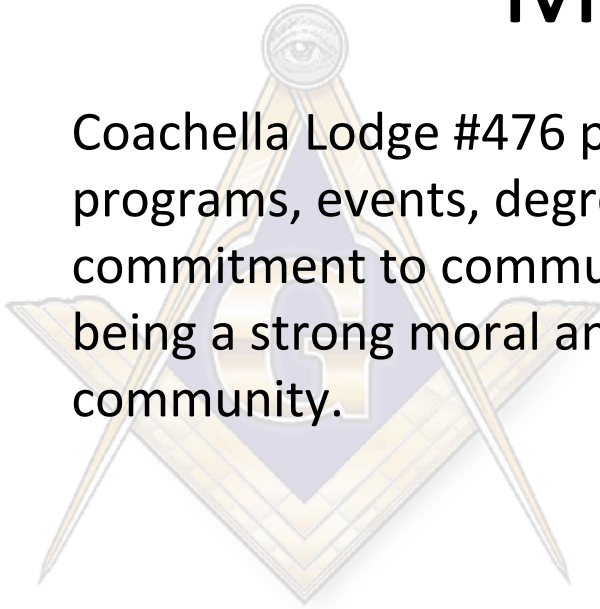


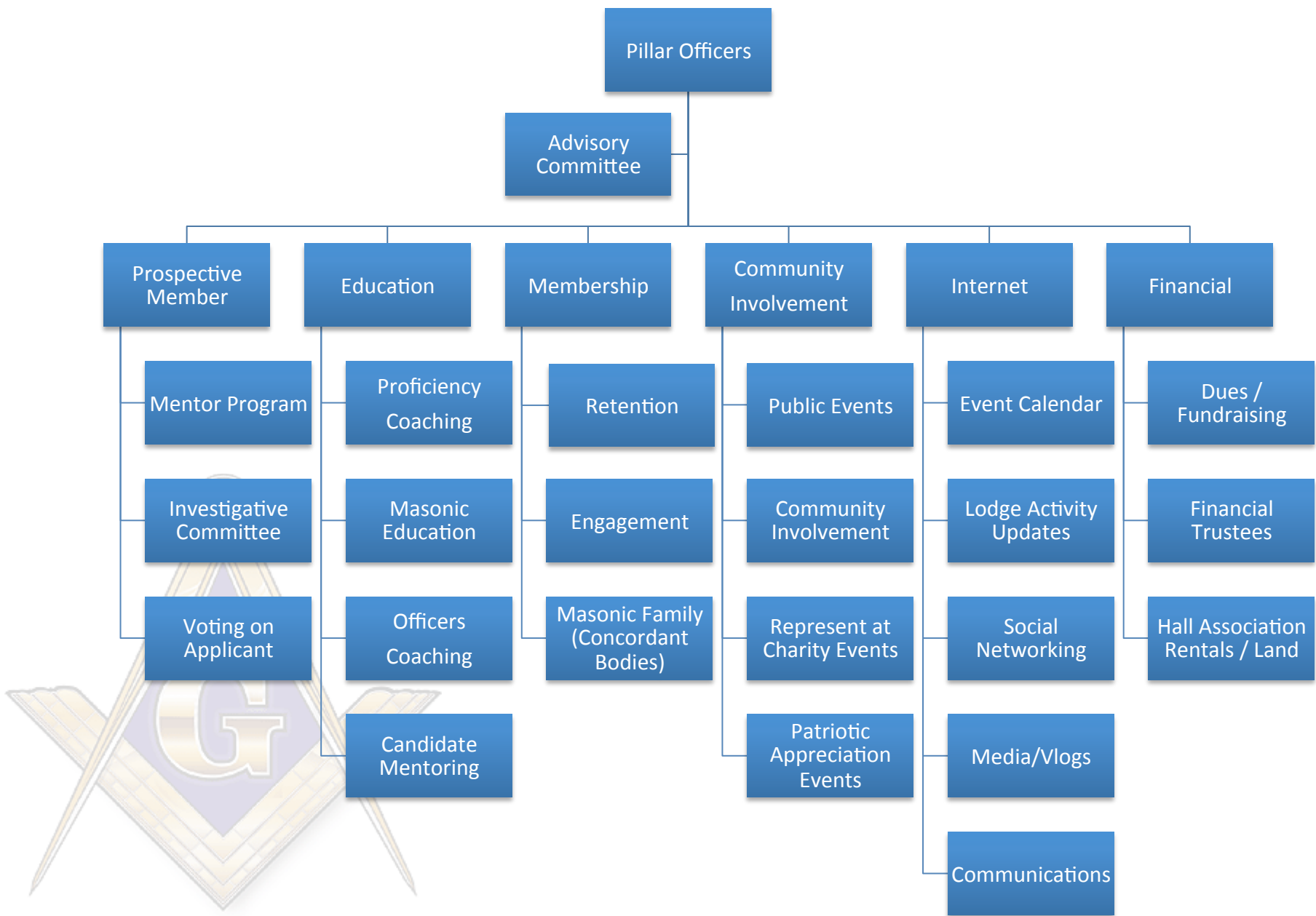
Vision Statement

We seek to act as a beacon of knowledge for all who seek further light in life and in Freemasonry while creating life connections and ever lasting friendship.

Mission Statement

Coachella Lodge #476 promotes fraternal bonds through our education programs, events, degree ceremonies, community and charity programs. Our commitment to community service fortifies and supports our tradition of being a strong moral and patriotic support system for our Nation, our city and community.





Coachella #476's Steps of Excellence

While keeping our passions within due bounds, we shall have the intention of maintaining the roots of Freemasonry by employing the Coachella #476's Steps of Excellence as a guide for safeguarding the sacredness of the Craft as prescribed below.

1. Guarding the West Gate

- Continue to improve the quality of prospects so that they will learn to become good Masons and be an asset to the Lodge. We shall adhere to the stipulation from the Charge of the Entered Apprentice *“by refusing to recommend anyone to a participation in our privileges, unless you have strong reasons to believe that, by a similar fidelity, he will ultimately reflect honor on our ancient Institution.”*
- A prospect must become a friend before becoming a Brother.
- As not to breed apathy or the attitude that the Lodge is just a Gentlemen's Club, the WM should only bring in new candidates if there is sufficient work for them.
- All prospects will be assigned a mentor. It is the mentor's duty to share appropriate Masonic principles, history, and culture. Periodically, the mentor shall confer with other brethren to ascertain the prospects fitness for the Craft, which, when appropriate, he will report his findings to the WM. This is typically 5 months.
- Provide that there are adequate numbers of qualified Investigators to conduct prospect interviews.

Coachella #476's Steps of Excellence

2. Being Proficient in Masonic Ritual and Law

- Ensure that all officers are duly qualified for their post. There should also be a sufficient pool of qualified Mason's who can substitute in the chairs.
 - Proficiency and performance in Ritual is to the Mason's ability (skill set) and comfort; but not enable or breed complacency.
 - Ensure that all new officers are given list of proficiencies and duties.

3. Advance Brethren Through the Degrees by Mutual and Genuine Effort

- Solely use the Grand Lodge's approved Candidate's Proficiency and Education Program to support the continued improvement of the candidates in their progression through the degrees.
 - Coach must allot sufficient time and recourses. Candidate must reciprocate this effort.
 - Candidates should be encouraged to take no longer than 90-120 days between the degrees with exceptions.
 - Ensure that candidate understands and can recite Proficiency.
 - Have the candidate and discuss a topic within the degree before next degree
 - A Coach, who receives regular training, will be designated for each Candidate.
 - Senior Warden to obtain feedback from coaches and candidates and assist as needed.

Coachella #476's Steps of Excellence

4. The Selection and Advancement of Officers Should be by Merit Alone

- “By merit alone” implies the progressive line. The WM, SW, JW, Treasurer, and Secretary shall be duly qualified and nominated and elected by the brethren. The WM will appoint at his sole discretion the appointed officers with advise from the Officer’s Coach and the other officers.

5. Dressing Your Best for Lodge

- One’s dress is an outward expression of respect and dignity for the task at hand.
 - To promote unity within the lodge, the Officers should be the standard bearer for appropriate dress. Appropriate attire for tiled meeting is a suit or modified attire at the discretion of the WM. For degrees, the officers should wear tuxedos or dark suits.
 - “Dressing Your Best for Lodge” may be based upon a member’s financial resources. Out of the spirit of “relief,” a brother or the Lodge may, of course, provide the member with a suit or more appropriate attire.
 - The WM or Tiler shall whisper council in ear of the brother who is not “properly dressed.”

Coachella #476's Steps of Excellence

6. A Lodge Must Offer Quality Assemblies and Be Willing to Pay For Them

- Self explanatory

7. The Return of a Sense of Awe to Our Ceremonies

- Solemnity and reverence must be present
- The use of sounds, lights, and other effects may be used for increase effect.
- Ensure that our tradition of Costume Degrees can be sustained.

8. Masonic Education

- Maintain a program to address membership needs and public exposure from the wealth of diverse knowledge contained within Freemasonry.
 - At every meeting, there should be either formal or informal education.
 - Increase advertising efforts – email, Facebook, word of mouth, flyers
 - Tailor a 3-5-7 talk at the end of meetings and degrees
 - Set curriculum for the year with a diversity of presenters
 - Topic and presentation must be approved by Master or committee
 - Liaison to Grand Lodge education programs
 - Create a feedback form

Coachella #476's Steps of Excellence

8. Masonic Education (con't.)

- Aspire that Master Masons return their 3rd degree proficiency.
- Additionally, the Lodge Library project will continue with the support of volunteers for the express purpose of creating an active library with digital, hardback books, and articles.
 - Substantially increase the number of books, CDs, videos, magazines, and DVDs in our Lodge Library to provide further education to our brothers.
 - We need to utilize our website to share many Grand Lodge approved videos, podcasts and informative articles readily to the public searching for information.
- Develop a rapport with other Lodges whom we can invite to our functions and notable masons who can be invited as guest speakers.



Membership

Continue to develop membership cultivation and retention methods.

- The WM must have sufficient work for each member of the Lodge for them to feel valued.
- New membership (see Coachella #476's Steps of Excellence: Guarding the West Gate)
- Increase active membership and retention
 - Create a Membership Survey
 - What can be done to bring non-active members back to the Lodge?
 - Committee members must be social people
 - Always strive for face-to-face contact versus phone or email
 - Discuss 5-year plan, Lodge calendar, and topics of future Masonic education events.
 - Develop greater relationship with Concordant bodies.
- Maintain vigilance of potential suspension of non-dues paying members to limit paying unnecessary “per caps”

Lodge Finances and Budget

Maintain Lodge solvency by following GL guidelines, utilizing professional accounting methods, and maintaining prudent fiduciary responsibility.

- Adhere to the approved Master's budget
- Primary funding sources are membership dues and fundraising events. Funding may be supplemented as needed by Hall Association.
 - Consider adhering to the GL Annual Dues calculation formula
 - Consider dues raising in accord with the upgrades to facilities and programs
 - We are charging less per year than many lodges of its same class size.
- There should never be a need to draw funding from the Lodge's investment fund.
 - Consider adopting the GL Investment Program
- Consider adopting INTACT for accounting and mandatory filings

The Lodge has achieved a level of financial stability, but it is not ensured.

- Must continually work with the Hall Association to improve facilities and rentals.

Fundraising

Continue fund-raising events to support Blue Lodge and selected Lodge charities. Due to limited active membership, we shall focus on only a few well-organized events.

- We will continue:
 - BBQ
 - Chili Cook-off
 - Silent Auction
- As time and personnel allows perhaps add:
 - Fireworks booth
 - Golf Tournaments with local business sponsors
 - Breakfasts and meals (Sweetheart, Easter, Father's Day, Mother's Day, etc.)
 - Bowling/shooting Tournaments with local business sponsors
 - Specific Lodge events open to other Lodges for admission fees for dinners (special degrees, Masonic Education events, etc.)
- Utilize community resources
 - Seek free advertising within country clubs and from newspaper, radio, and TV
 - Advertise within Masonic community

Community Involvement

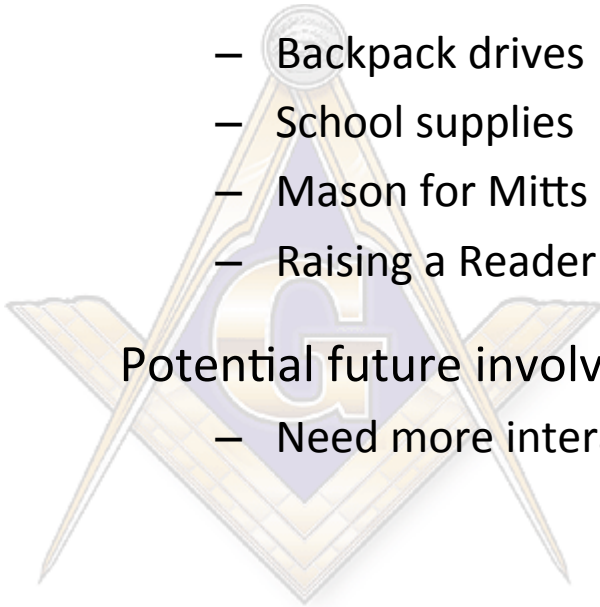
We shall continue to foster our Masonic values in our community. Due to limited active membership, we shall focus on only a few well-organized events.

We will continue:

- Public School awards
- Food drives
- Backpack drives
- School supplies
- Mason for Mitts
- Raising a Reader

Potential future involvement may include:

- Need more interaction with city hall and other organizations



Advisors

- WM shall consider creating and appointing an Advisory Committee, which may be comprised of PMs to provide council and assist the WM as needed and shall convene as required.

Other Opportunities

- We need to better distribute the responsibility and workload of the Lodge.
 - Utilize prospects and candidates
- Outside of normal and required communication with Grand Lodge, we should endeavor to maintain an active relationship by sharing resources, education and discussing of methods.

Summary

- The Lodge has achieved a level of financial stability, but it is not ensured. We must maintain diligent mindfulness on all income streams and expenses to safeguard the Lodge's solvency.
- Continue the intention of implementing the Coachella #476's Steps of Excellence to safeguarding the sacredness of the Craft.
- Continue increasing membership engagement and retention through the use of dynamic Masonic education and well-organized events.
- Continue to develop and strengthen our involvement within the community, which thus far has been met with an exceedingly positive response.
- Continue to draw from the wisdom of PMs and others with the creation of an Advisory Committee.
- A system for the "goal tracking" will be devised and attached as an addendum.

2014-2017 Accomplishments

- Stronger fraternal bonds within the lodge.
- Website redesign, active Facebook and social network updates.
- Paypal for Hall Association and Blue Lodge.
- Increased lodge dues in 2014
- Regular QUALITY Masonic Education.
- Quality of stated meeting dinners and meeting refreshments has increased (bbq, snacks, beverages etc).
- More austere, respect and regard for ritual work.
- Considerable Lodge facility improvements
- Rentals improved (contract, processing, volume)
- Guarding the West gate (candidates, applications, better communication with candidates)
- Stronger officers and officer training.
- Reinforcement of yearly events
- Lodge finances organized (possible implementation of Grand Lodge program)
- Grand Lodge & Concordant Body involvement (Raising a Reader, Blythe Lodge donation to Shriner's hospitals, retreats, Grand Master's program)
- GM multiple visits due to our programs and Masonic Education.