

Step 1: Lodge Planning - This Step outlines how a Lodge can consider and plan its future.

It is recommended that every Lodge should complete this process periodically, whether it is a successful Lodge or a Lodge that is struggling.

The planning process includes: Creating a Lodge profile (during which members review the Lodge's current situation); where appropriate, defining and clarifying the qualities and circumstances of men who will be well suited to the Lodge and its membership; deciding how the Lodge will increase its visibility and promote itself in its local community, and agreeing a plan of action to develop the Lodge. This Step is meant to be completed before any specific person is considered for Initiation and should help Lodges when seeking and identifying prospective new members.

The first time a Lodge embarks on Step 1 it may require a number of meetings to complete the process. Planning meetings should be chaired by a suitably skilled and experienced member; one who cares about the future of the Lodge and is prepared to let all others have their say, even if their suggestions appear radical to others. The chairman may ask the Lodge **Membership Officer (LMO)** to assist in planning the agenda for the meeting or meetings.

The first stage in the process is the preparation of a **Lodge profile**. A Lodge profile describes the Lodge's key features and especially its characteristics, circumstances, expectations and values. As a member's continued involvement largely depends on there being a good match between him and the Lodge, the Lodge's characteristics, circumstances, expectations and values are especially relevant to anybody being considered for membership. By creating a Lodge profile, Lodge members will also have a useful document from which other materials, such as brochures for external use and promotion, can be created.

To create a Lodge profile, ask members to write down all the questions that a person interested in membership of their Lodge might ask. The answers will form much of the final profile. If the Lodge profile includes a common interest (such as a sport, a particular hobby, an old school or place of worship) or a distinctive feature (such as meeting at places or times that are noticeably different from other Lodges) this might suggest that the Lodge could look specifically for more members who share the same interest or characteristic. The Lodge can then create a profile of an ideal candidate. This will help the Lodge to focus its search for prospective candidates and to consider whether their attributes are a good match to the Lodge. Equally, diversity in membership is important in any successful group, especially in having people with a range of different personalities, skills and qualities.

The Lodge plan can also address how the Lodge makes others in the local community aware of its existence, being mindful of UGLE's vision for 2020, which is to: "become openly recognised within our communities as the premier fraternal organisation and the society of choice for individuals with high standards of integrity who are seeking fellowship, personal development, social and charitable involvement that satisfies the needs of themselves and their families."

The Lodge profile can be developed into an outward facing leaflet or brochure, intended for non-Freemasons and written in language that they would understand, as well as this medium the Lodge can promote itself to the local community through other events organised by other organisations and by the Lodge.

During the Lodge planning meetings, the Lodge should be able to identify members to fulfil key roles: - If one has not yet been appointed, possibly an enthusiastic and appropriately skilled member, not necessarily a PM, could fill the role of Lodge Membership Officer (LMO). It may be appropriate to combine the role of LMO and Lodge Mentor, or indeed use the services of other Members who might be willing to meet with potential candidates, who approach the Lodge with an interest in joining. Whatever the course taken the Lodge plan should be documented with clear responsibilities allocated to named members, deadlines defined and review points and dates agreed.