



# TERM PROGRAM PLANNING

Program Planning is key to the overall success of a DeMolay Chapter

When a Chapter thinks about Program Planning, generally they think only of the next Master Councilor term. Proper planning includes two types of planning: Long Term (the next year) and Short Term (the next Master Councilor term). Both are equally important and both depend on each other for success of the Chapter.

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# Why Plan?

There are four important reasons for term planning:

1. Organization –  
In order to establish a good Chapter Program, which will be well balanced throughout the year. It enables everyone in the Chapter (officers, advisors, and members) to know exactly their responsibilities for the term.
2. Effectiveness –  
By advance planning, both members and Advisors know that the programs of the chapter will be effective and success. It insures that programs and activities are planned and promoted in advance.
3. Image –  
Advance planning conveys to the public, the Masonic family, and the members and advisors of the chapter a positive image that the chapter is being operated in an efficient and effective manner. It shows that Chapter is a “going” concern.
4. Good Business –  
Its just good business, to plan your program and budget in advance. This helps in planning and carrying out the most successful activities possible.

# Who’s Responsible?

1. Master Councilor - has the major responsibility since he is responsible for the successful programming of the chapter during his term.
2. Senior Councilor – has an interest because he will probably be the next Master Councilor. He should be concerned over the planning in the current term, as it will affect his term.
3. Junior Councilor – as in the case of the Senior Councilor, he should be concerned with the upcoming year’s plans as he will be serving and a successful and going chapter is much easier to work with when his term as Master Councilor comes up.
4. Chapter Advisor – as the representative of the Advisory Council to the chapter members, he should be concerned with the upcoming plans of the chapter and should keep in mind the advisor staffing requirements necessary to carry these plans out.
5. Members – it’s there chapter and they have a responsibility to help develop a successful program to keep up their and fellow chapter member interest and enthusiasm as well as provide a program that will attract new members.

As pointed out above, all these individuals should be most concerned with the successful operation of the chapter.

# The Planning Process

Step 1: Conduct a Chapter Members' Survey

Step 2: Evaluate the Survey

Step 3: Actual Program Planning

- A. Long Term
- B. Short Term
- C. Select Committee Chairmen and Project Leaders
- D. Establish a Budget

Step 4: Approval, Distribution and Implementation

## Note About Long Term Planning

Long Term Planning is planning reaching out beyond 180 days (or more than one term of office). It includes projected activities for an entire year, especially those you do annually or those which will require additional planning. Long-term plans establish your Chapter's membership recruitment goals, methods, and timetables. It also gives the Senior and Junior Councilors the basis on which to start their planning for when they become Master Councilor. It includes the yearly operating expenses and projected fund raising needs. Finally, it fits into the "real" long term thinking and planning (3-5 years) which should be done by the Chapter and, most importantly, the Advisory Council.

## Actual Planning Sessions

Once all pertinent information has been gathered, the actual planning meeting is held. In attendance are:

1. The three Councilors,
2. Committee Chairmen and Project Leaders, and
3. The Chapter Advisor

Once the calendar has been developed, those at the planning session analyze the overall program. Go over the entire program to be certain that it is well balanced and offers a good variety of activities for all members. Check to be certain that you have included all the required items to qualify the Master Councilor for PMC-MSA.

At each planning session, the group is planning one year in the future: the next term (usually 6 months) in detail, and the following term in rough. This gives the group the chance to confirm future dates such as annual chapter events, meeting dates, installations, district/region or jurisdiction events (such as conclaves), and "big" chapter activities, which may require a lot of advance planning.

At the same time, review and evaluate your budget. Compare your outgo against your income and determine where the weak areas are. Try not to cancel events due to lack of funds, but rather consider less expensive methods or more fund raising to cover the expected expenses. Remember, the object is to not only cover all expenses during the term, but also bank extra money for the future financial stability of the chapter.

### **The Process:**

1. Review the Member Interest Survey forms
2. List Required and Annual Events.
  - a. Obligatory Days
  - b. Chapter elections and installations
  - c. District/Region and Jurisdiction events
  - d. Annual Chapter events
  - e. Monthly Chapter and Advisory Council meeting dates
  - f. Parents' Club, Sweetheart, and Squires meeting dates
3. List Membership Plans
  - a. Degree Dates
  - b. Dates for Membership Recruitment Plans
  - c. District/Region and Jurisdiction Membership Programs
  - d. Annual Conclave/Convention and Grand Master Degree dates
4. Develop the Term Plan, Month by Month
  - a. Taking general plans and plan in detail with dates, times, places, and committee/project responsibilities
  - b. Plan for a balanced Chapter program of activities
    - i. Social
    - ii. Civic Service
    - iii. Fund Raising
    - iv. Athletics
    - v. Masonic Service
    - vi. Obligatory Days / DeMolay Month
    - vii. Ritual Practices and Degree Dates
    - viii. Membership Recruitment
    - ix. Special Programs at meetings
    - x. Other local Chapter, District/Region and Jurisdiction events.
  - c. List all know local school, city, county, local Masonic Family special events, as well as national holidays. Avoid conflicts and schedule the Chapter's program around conflicts.
  - d. Review the Program and ask the following questions:
    - i. Is the program activity appropriate for the Chapter's current situation (membership, budget, resources, advisors)?
    - ii. Are the activities varied and well dispersed over the term?
    - iii. Does the program plan fulfill the PMC-MSA requirements?
    - iv. Does the entire program offer a well-balanced variety of activities that meet the interests of all Chapter members.

- e. List activities that will take place at each meeting on the monthly schedule
  - i. Committee and Project Reports and Chairs
  - ii. Degree Conferrals
  - iii. Known Business
  - iv. Entertainment or special programs
  - v. Parents' Club, Sweethearts, and Squire meetings
- f. Prepare the Term Budget
  - i. Figure your term cost, activity by activity, month by month
  - ii. Determine the cost of each activity
  - iii. Determine and list your "fixed" expenses on a monthly basis.
  - iv. Evaluate your income, activity-by-activity, month-by-month.
    - 1. Fund Raising
    - 2. New members
    - 3. Activity income
    - 4. Income from investments and banking interest.
  - v. Review your budget and balance it. Compare your expenses against your income and determine weak areas. Try not to cancel events due to lack of funds. Instead consider less expensive methods or more fund raising to cover the added expenses.

The planning isn't over yet, however. The plan must be constantly evaluated and revised. This is done at Councilors' Meetings.

## Councilors' Meetings

Once the Term Program Plan has been adopted, the Councilors' have the responsibility of making certain that it is successfully implemented. To do this, regular Councilor Meetings need to be held:

1. Monthly Councilors' Meetings
 

Monthly the Councilors, Chapter Advisor, and Committee Chairmen and Project Leaders, as needed, meet to:

  1. Evaluate the previous month's chapter program (what was successful, what was not and why)
  2. Review the upcoming month's program, making adjustments to the program as needed, and making certain everything is ready to go, and if not developing plans to put things back on the right track.
  3. Look at the balance of the term program, reviewing plans in general and making adjustments as necessary.
  4. Review Membership and Fund Raising efforts
2. Councilors' Meeting Prior to Stated Meetings
  1. One to three days prior to a stated meeting, the Councilors and the Chapter Dad meet to finalize the agenda for the chapter meeting. The agenda should highlight current and upcoming chapter program events.

2. The Master Councilor, following this meeting, should print up an agenda to be passed out at the meeting. The agenda should include a calendar of upcoming events.
3. The Master Councilor should call committee chairmen and project leaders to confirm their attendance and any report or promotion they need to make.

## **Elements of a Program Plan**

There are three elements of a Program Plan:

1. The Calendar
2. The Budget
3. List of Committees and Project Leaders

### **The Calendar**

The Calendar is a listing of all the activities of the Chapter, including dates of district, region, and jurisdictional events and activities. It is presented on a printed calendar.

### **The Budget**

The Budget is an estimate of all the income and expenses of the Chapter during the Calendar period. This includes all incomes and expenses from activities as well as expenses such as rent, postage, supplies, and membership fees.

### **Committee List and Project Leaders**

This is a list of all standing committees and special project leaders of activities and programs for the chapter.

## **The CALENDAR**

There are three types of events to include in the term program calendar:

1. Chapter Meetings
2. Chapter Activities
3. Activities of other Chapters in you District or Region and the Jurisdiction.

### **MEETINGS**

Begin planning the Calendar by scheduling:

1. Chapter Meetings
2. Advisory Council Meetings
3. Councilors' Meetings
4. Appendant Body Meetings (Parents' Club, Sweethearts)
5. Chapter Nomination and Election Nights
6. Installation Date
7. Ritual Practices
8. Degrees

## **CHAPTER ACTIVITIES**

Always remembering that, “Members Support What They Help Create,” lead the Chapter in a process of selecting activities for the term.

A successful program has a “good balance” (something for all members to take part in and enjoy) of the following activities:

1. Social / Fun Activities
2. Fund Raisers
3. Obligatory Day Observances (and DeMolay Month)
4. Civic Service and Charitable Projects
5. Sports Events
6. Masonic Service Projects

Don’t forget to list annual chapter events.

## **LOCAL CHAPTER, DISTRICT/REGION AND JURISDICTION ACTIVITIES**

Attending activities of other chapters, districts or regions, and the Jurisdiction can be a lot of fun and a great enthusiasm builder for your chapter.

Make sure you have a copy of the latest district/region and Jurisdictional Calendars so that you know what is happening around the Jurisdiction during the term.

Avoid planning activities on the same day as your local district/region events or any jurisdiction event or program.

## **CHOOSING CHAPTER ACTIVITIES**

It’s very important to include Chapter members when choosing activities for the term.

Members who have helped decide which activities to plan will be more supportive than if they were just told what the Chapter would be doing.

### **HAVE A PROGRAM PLANNING PARTY**

Get the Chapter members together one night, have pizza and sodas, and brainstorm activities and programs for the term.

Follow the process below in brainstorming and selecting activities

Avoid having the planning party in conjunction with other activities. Make planning the term the focus for the evening – and make it fun, too!

### **BRAINSTORMING ACTIVITIES AND PROGRAMS**

Brainstorming can be a lot of fun if you follow few simple guidelines, everyone will be able to participate and you’ll get a lot of great ideas.

Gather the members in a room with an easel pad of large paper to write on in front of the group. Make sure everyone can see the easel and participates.

Brainstorm activities by category:

1. Social
2. Fund Raising
3. Sports
4. Civic Service and Charitable

5. Masonic Service
6. Obligatory Days (DeMolay Month)
7. Membership

Spend just five minutes on each category. You'll be surprised how many great activities the group will come up with.

Follow these important Brainstorming Guidelines:

1. Every idea is a good idea
2. Don't make comments on anyone's idea.
3. Have a leader to write the ideas down on an easel pad or large paper.

## **SELECT THE ACTIVITIES**

When you are done brainstorming you should have a long list of activities in each category. Decide how many activities in each category you will include in the Program Plan. Choose the top activities in each category to fill out the number.

For example: If the decision is to have four social activities, have the members rate or prioritize the activities on the brainstorming list and pick the top four.

The recommended number of activities per term is as follows:

- 4 – Social/Fun Activities
- 2 – Sporting Activities
- 2 – Fund Raising Activities
- 1 – Masonic Service
- 1 – Civic or Charitable Service Program

## **SELECT THE DATES**

The date of an activity can make the difference between success and failure.

Be very careful when selecting dates for activities.

Steps to selecting the right dates:

1. Place all of your Chapter Meeting dates, Councilors' Meetings, Advisory Council Meetings, Ritual Practices, and Degrees on the calendar first.
2. Place all District/Region and Jurisdictional dates next.
3. Place Obligatory Day Observances as close as possible to the suggested date. (Remember, DeMolay Month is March, which includes the traditional Founding of DeMolay Observance on March 18<sup>th</sup> and, of course, Devotional Day)
4. Avoid all major community activities and events. These include county fairs, major holidays, and school graduations, dances, games.
5. Consider the weather, season, availability of sites, transportation, and other details of the activity that could effect the date.
6. Develop a Membership Plan which defines the goal for the term, how new members will be recruited (open houses, one on one, top 10, or other special activities), involvement in any district/region or jurisdictional membership program, including special Grand Master-type initiations. Don't forget to plan an orientation and retention program for not only your new members, but also current members.

# PMC-MSA PROGRAM

When developing the term program plan, the Councilors should make certain that the requirements of the Past Master Councilor's Meritorious Service Award are met. Every Master Councilor should earn his PMC-MSA. To do so, you must start work on it when you are the Junior and Senior Councilor. In earning PMC-MSA, it is the chapter, which truly benefits because it means that the chapter has a successful, well balanced and planned program, where new members are being recruited and all members are enthusiastic about DeMolay and the Chapter.

## The CALENDAR SUMMARY

### 1. Schedule all Meetings

- Chapter Meetings
- Advisory Council Meetings
- Councilors' Meetings
- Degrees
- Ritual Practices

### 2. Choose Chapter Activities

- Have a Program Planning Party
- Include all Chapter members
- Brainstorm ideas for Activities
- Select Activities from the Brainstorming List

### 3. Set Dates for Activities

- Place meetings first
- Place District/Division dates
- Place Jurisdictional dates
- Schedule Obligatory (DeMolay Month) dates
- Avoid major community and school events, and holidays
- Consider the season, weather, and availability of sites

### 4. Put all Dates on a Printed Calendar

Put date on a calendar that can be used by Chapter Members for their awareness and use for other dates as well.

# The BUDGET SUMMARY

1. **Budget Operating Expenses**
  - Masonic Hall Rent
  - Supplies
  - Postage
  - Printing
2. **Budget Chapter Activities**
  - Income estimated from the activity
  - Expenses estimated for the activity
3. **Budget Membership Fees**
  - Estimate the number of new members for the term
    - \$25.00 to DeMolay International
    - Amount due State, if any
    - Remainder to your Chapter Account
4. **Budget Miscellaneous Items**
  - Donations
  - Awards
  - Gifts
  - Interest on Accounts

## Frank S. Land Chapter - Order of DeMolay TERM BUDGET

Item	Income	Expense
Temple Rent		\$ 300.00
Supplies		\$ 100.00
Postage		\$ 100.00
Printing		\$ 150.00
Membership Fees	\$ 500.00	\$ 275.00
Winter Carnival	\$ 300.00	\$ 125.00
Pancake Breakfast	\$ 400.00	\$ 275.00
Parking Lot Fund Raiser	\$1,000.00	\$ 100.00
Spring Fling Dance	\$ 250.00	\$ 150.00
WOFAB	\$ 100.00	\$ 100.00
Bowling Night		\$ 100.00
Patriot's Day Observance		\$ 50.00
DeMolay Month		\$ 200.00
Councilors' Retreat		\$ 100.00
State Workshop	\$ 100.00	\$ 100.00
DLC		\$ 100.00
Donations	\$ 100.00	
<b>TOTALS</b>	<b>\$2,600.00</b>	<b>\$ 1,950.00</b>

**Income over Expense: \$650.00**

# COMMITTEE AND PROJECT LEADERS

A master Councilor cannot do everything himself during a term. Appoint committees and committee chairman to take on programs for the Chapter. Make sure that goals are established for each Committee

## STANDING COMMITTEES

There are five standing committees required by DeMolay International Rules and Regulations. Each Committee should have a Chairman, and at least one other member, preferably two, and an Advisor. The Master Councilor is an

Ex-officio (non-voting) member of all chapter committees.

- Entertainment
- Finance
- Auditing
- Membership
- Sick

## OTHER COMMITTEES

You may want to appoint other committees for the term as well. Each Committee should have a Chairman, at least one other member, and an Advisor. These Committees could include:

- DeMolay Month Committee
- Chapter of the Year Committee
- Awards Committee
- Refreshments Committee
- Ritual Committee

## APPOINT PROJECT LEADERS

Appoint a project leader for each activity of the term. Survey the chapter members to determine who is interested in serving as the project leader for an activity.

Meet with the project leaders soon after the installation to make sure that they are aware of the goals of the activity. Have them work out a detailed budget for the activity. Also have them prepare a timeline and check list for accomplishing the activity.

Stay in touch with your project leaders at all times so that you are aware of what progress is being made on the activity.

## The Committee SUMMARY

1. Appoint Standing Committees
  - Entertainment Committee
  - Finance Committee
  - Auditing Committee
  - Membership Committee
  - Sick Committee
2. Appoint Other Committees
3. Appoint Project Leaders

# PROGRAM PLANNING MASTER CHECK LIST

Use this checklist as a guide through the Program Planning process. Before you put your Program Plan in final form, go through the checklist and mark off all of the items you have completed. If there are items not on the checklist that you need to complete, add them to the checklist. Remember that the final plan must be approved by your Advisory Council.

## 1. **The Calendar**

- Schedule all Meetings
  - Chapter Meetings
  - Advisory Council Meetings
  - Councilors' Meetings
  - Degrees
  - Ritual Practices
- Chose Chapter Activities
  - Have a Program Planning Party
  - Include all Chapter members
  - Brainstorm ideas for Activities
  - Select Activities from the Brainstormed list
- Set Dates for Activities
  - Place Meetings first
  - Place District/Division and Jurisdiction Dates
  - Schedule Obligatory Days (DeMolay Week) Dates
  - Avoid major community and school events and holidays
  - Consider the season, weather, and availability of sites and Resources
- Put all Dates on a Printed Calendar

## 2. **The Budget**

- Operating Expenses
  - Masonic Hall Rent
  - Supplies
  - Postage
  - Printing
  - Insurance
- Chapter Activities
  - Income estimated from all activities
  - Expenses estimated from all activities

- Budget Membership Fees
  - Estimate number of new members for the term
  - \$25 to DeMolay International
  - State Fees, if any
  - Balance to Chapter Account

- Budget Miscellaneous Items
  - Donations
  - Gifts
  - Awards
  - Interest on Accounts

**3.  The Committees and Project Leaders**

- Appoint Standing Committees
  - Entertainment Committee
  - Finance Committee
  - Auditing Committee
  - Membership Committee
  - Sick Committee

Appoint Other Committees

Appoint Project Leaders

**4.  Get Approval of Program**

- Chapter Members
- Advisory Council

**5.  Print and Distribute Calendar**

- Adequate number of copies of program printed
- Distribute Calendar to members
  - At Chapter Meeting
  - Mail copies to other members
- Distribute Calendar to Advisors, Parents, Sweethearts, Squires
- Mail copies of Calendar to Masonic bodies meeting in your Masonic Hall
- Mail copies to local Chapters in your area
- Mail copies to District/Region officers and advisors
- Mail copies to Jurisdiction officers, Executive Officer, state office.