



Loyal Order of Moose

Fraternal Operations: Key Steps to Success

A Guide
for the
Moose Lodge
Self-evaluation Process

Presented by the
Supreme Secretary's Department and
the Fraternal Operations Departments.

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Fraternal Operations – Key Steps To Success

Fraternal operations are the sum-total of everything that goes on at a Moose Lodge or Moose Family Center; from the Social Quarters operation to the fund raisers for Community Service activities; from new member enrollments to activities for members. Literally hundreds of “things” should be happening day-to-day or getting done throughout the course of a year to make a Moose Lodge/Family Center a successful, growing enterprise. Sometimes, when a new Board of Officers is installed at the beginning of its Moose fiscal year, the number of goals, projects, committees, tasks and activities they are expected to implement or oversee can seem overwhelming.



This is often also true in a Lodge that is operating “less than successfully” or one that finds itself struggling. Where does the Board begin to pull a Lodge toward greater stability and success? How do we measure success? Where can we get help to guide us? These types of questions even come from Lodges doing a pretty fair job, but that want to improve on their current level.

The purpose of the Fraternal Operations – Key Steps to Success process, and the accompanying self-evaluation worksheet, is to help those Boards of Officers who want to measurably improve and achieve success in fraternal operations. It is a “self-help” guide that can assist the “management team” to FOCUS on key priorities and make step-by-step plans for improving based upon the circumstances and needs of their own particular Lodge.

How Do We Measure “Success”?

Defining and measuring success in any endeavor often involves identifying ways in which growth has occurred. Has the quality or quantity outcome of some action improved? Does it meet a standard of excellence? Our fraternity recognizes those Lodges which have achieved growth in very specific measurements by bestowing upon them the Lodge Merit Award.

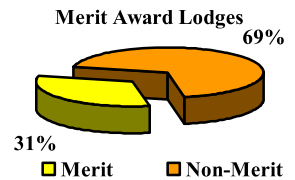
To qualify for the Merit Award, a Lodge/Family Center must:

- Have a minimum of 100 good standing members;

- Show an increase in good standing members for the year;
- Show an increase in net assets for the year; and,
- Follow the General Laws of the Order.

The Lodge must also participate in District, State or Provincial and International meetings, workshops, training seminars, schools and conventions as required by our General Laws.

The criteria for reaching this mark of distinction are excellent measurements of growth that make a successful Lodge. Yet, only 31% of our Lodges achieved it during fiscal year 2002, the most recent for which we had complete records at this writing.



Improving the growth and strength of the fraternity are fundamental to our success, and they are the responsibilities of every unit, at all levels of the organization, top to bottom. Increasing the number and percentage of Lodges that qualify for the Merit Award is one goal of the Moose International — Fraternal Operations Department. Pursuing success in fraternal operations should be the goal of every Lodge Board of Officers.

What Are the “Key Success Factors”?

There are five key areas in which successful Lodges perform well. When we look at Lodges that are stable or growing in good standing members and net financial assets, as in our Merit Award winning Lodges, we find they seem to be working harder and/or making better progress in these five areas than are average, unstable or declining Lodges.

The Five Key Factors are:

- Leadership and Education;
- Leadership Performance and Direction;
- Membership Orientation/Enrollment and Retention;
- Activities for Members; and,
- Joint Communication and Cooperation.

We can call these key factors “predictors of success.” When a Lodge is actively working to improve their results in one or more of these five areas, it is reasonably predictable that they will be moving forward, toward a higher level of success.

How Do We Know?

Based upon surveys of fraternal leaders from the associations and from general members done over the past three years, in addition to discussion groups in Administrator schools and from input from the entire Fraternal Operations staff — including the Supreme Secretary's Field Staff who conduct dozens of Lodge Evaluations every year — we developed a pattern of factors important to the success of Lodges.

We also analyzed some facts about the 587 Merit Award Lodges for fiscal 2002 in the categories for which data was obtainable. Using the 25-item Lodge Evaluation Form completed by the Supreme Secretary's Assistants on each Lodge they visit, we sorted the "indicator" items into the Five Key Factors, assigning five indicators to each Factor to develop the Key Steps to Success — Self-evaluation Worksheet.

Some Facts About the Success Factors

Let's take a "tour" through a few of the indicators listed in the Key Success Factors. You can follow along in the Moose Lodge Self-Evaluation Worksheet.

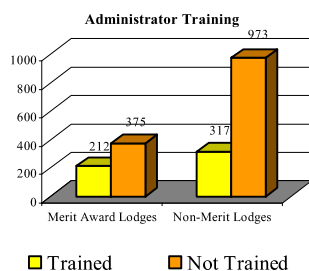
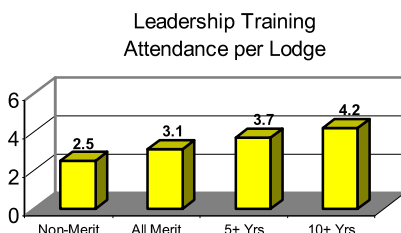
Leadership and Education

It should be self-evident; progress and success takes leadership. And, leaders need to know their jobs. So, these five indicators are checks on whether the Lodge has the people in positions to lead, and educated to do the job.

We find that a greater proportion of Merit Award Lodge Administrators have been trained at Mooseheart than in non-Merit Lodges.

One purpose for developing and implementing the new *Administrators Basic Class* is to help close the gap in education, especially for newer Administrators.

Leadership Training (annual *Orientation for New Officers and Committee Chairmen*) tends to be viewed as more important in Merit Award Lodges than non-Merit Lodges.



Merit Award Lodges send more people to training. Furthermore, the longer the Lodge has been earning the Merit Award, the more people they tend to send to annual Leadership Training.

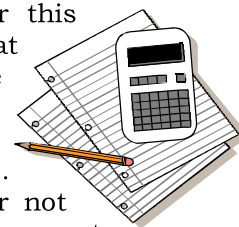
During the fraternity's Strategic Planning process, leadership education moved from 5th among seven priorities to become Strategy 3. In fact, at their meeting in Las Vegas in December 2001, 213 association leaders ranked Education/Training/Leadership Improvement as 2nd behind Membership Retention/Growth as the most important priorities for associations. At the 2003 Moose International Convention in Chicago, 209 attendees of this Key Steps to Success seminar ranked "Leaders Attending Training" as first among 12 choices in importance to Lodge success.

Clearly, Leadership and Education is an important factor in the success of a Lodge.

Leadership Performance and Direction

Some things are required. Lodge leaders have a fiduciary responsibility to protect the assets of the fraternity. And, there are legal requirements imposed upon officers as directors of the Lodge corporation, as well as those which are compulsory in our own General Laws and Constitution.

The list of indicators for this success factor are tasks that just must be done. The Board needs accurate and complete information to "manage" the enterprise. Failure to file tax reports, or not keeping financial liabilities current will surely collapse a Lodge.



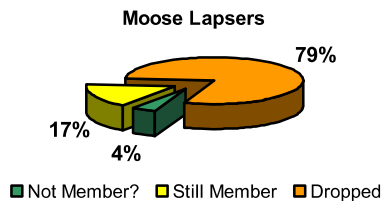
But, completing and filing reports isn't the end. Item 10 points out the necessity for the Board of Officers to identify actions that need to be taken, and to write and implement goals to improve results. This is what a "management team" does.

We suggest that a small team be assigned to review the items in this factor category. They should be allowed some time to go through reports and financial documents to analyze current status, and make recommendations where improvement appears warranted. The team, for example, might include the Audit Chairman, a Trustee and the Treasurer or Administrator, who are already somewhat familiar with the forms, reports and filing requirements.

Membership Orientation/Enrollment and Retention

Growth in good standing members, not just recruitment, but enrollment and retention of current members is an essential factor for success. Remember, earlier we stated that association leaders most often identified that membership growth and retention should be the number one priority of an association. These five indicators are tasks that can help a Lodge be successful in member growth and retention. Here are some convincing facts to consider.

Moose International commissioned a professional telephone “Lapser Survey” of 250 members whose dues had expired (lapsed). Of these, one in five (21%) didn’t think they were a “Lapser.” 4% didn’t think they were ever a member, and 17%, one in six thought they were still members. They explained the inconsistency between Moose records and their own perceptions by saying they forgot to send in their dues, mistaken records, they now belong to another Lodge, or infrequent attendance.



The survey confirms the importance of proper and accurate membership record keeping. It also reinforces the need for an active Membership Retention Team. Statistically, if your Lodge lost 12 members last quarter, a few phone calls could have very probably saved at least two of them.

Many new benefits expressly for Moose members have been added as a direct result of the efforts of our Momentum Strategic Plan. But those benefits can’t help members decide to stay a Moose if they don’t know about them.

Of those who knew they had let their membership lapse, almost eight of ten could recall no more than one feature/benefit of being a Moose. Yet, almost one in four said there was some/good/excellent chance they would consider rejoining after having all of the benefits pointed out to them. That means your Lodge might have been able to retain three more of those 12 lost members last quarter if it had an effective strategy for communicating our benefits to all members. Use multiple methods for getting the word out—through the Lodge newsletter, bulletin board, announcements at Lodge and Chapter meetings and social events, etc.

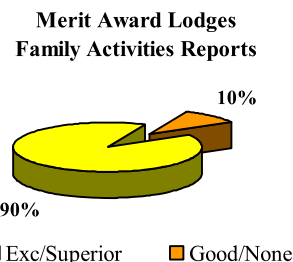
Activities for Members

The indicators in this factor category evaluate how well a Lodge and Chapter plan and implement a variety of fun things for members of all age groups to do in an attractive, inviting and safe atmosphere. This should be the most important benefit for a member.

Merit Award winning Lodges pursue programs for families to retain members and to achieve an increase in good standing members. As of 4/30/02, 540 Lodges had attained Family Center Status, just under 29% of all Lodges. Interestingly, one-half of all 2002 Merit Award Lodges had reached designation as Family Centers.



We correlated the winners of the 2002 Lodge Merit Award with another data base. Here is a powerful and telling fact: 90% of Merit Award Lodges were rated Excellent or Superior on their Family Activities Reports! They didn’t “forget” to



file a report, or receive a rating of “Participates” or “Good.” Ninety per cent were rated Excellent or Superior. These are the Lodges that showed growth in good standing members, and their leaders make a strong commitment to activities for the whole family.

We suggest that getting feedback from your members should be a part of evaluating performance in this success factor. We provide a sample Member’s Survey along with the Lodge Evaluation Worksheet. You may use the sample as is, or as a model to develop your own survey. It can be used as a written survey completed in the Lodge or mailed to members with the newsletter. To be sure you get responses from members who don’t regularly visit the Lodge, a small committee could be assigned to telephone a sampling of your members.

In fact, you might find it very enlightening to have the members of your self-evaluation team complete the Member Survey, then compare that group’s perceptions to those of your “customers” (members).

Joint Communication and Cooperation

First, let's be clear that this category is not about "Joint Management" of the social quarters. It asks the team members to evaluate the collaboration among the three units — Lodge, Chapter and Moose Legion — and between the fraternal organizations of the District, Association and Moose International.

Working together, planning and coordinating schedules and activities can help multiply the talent and the number of working hands available to our mutual and maximum advantage.



It can also help us get the maximum use of our Lodge Home; the revenue it can generate, and the FUN for all of our fraternal members. To reach the farthest destinations, to carry the greatest loads, the most successful Lodges and Chapters get all of the horsepower, in this case people-power, pulling the wagon together in the same direction.

The indicators under this success factor demonstrate the need for Lodge and Chapter leaders to support harmony and participation for all members of one fraternity, from the local to the state/provincial and international levels. Because it's what fraternalism is, and because our greatest strength lies in unity.

How Does the Process Work?

This process can be done as a project of the Lodge Board of Officers. However, throughout the discussion of the Key Success Factors, we have suggested that this process should be done as a team. We urge that the process include participation of both Lodge and Chapter Boards of Officers and other key Committee Chairmen, such as Membership, Family Activities and Moose Legion.

The purpose of the Self-Evaluation Worksheet is to assess where the Lodge is now in the key factors, and to establish priority areas to improve upon. The members of any group will have some differences in their perceptions and viewpoints. Getting those different perceptions incorporated into the assessment will give a broader and truer overall picture of the current status.

Most importantly, it is a fact of group dynamics that when people have an opportunity to help determine the needs and set the goals, they are more committed to achieving them. Make the evaluation and goal setting process an entire team effort from the beginning.

You should expect the process to take 2 to 6 weeks. Especially if you do the fact gathering recommended in the worksheet instructions, you may need to allow 3 to 4 weeks to analyze some of the reports and records, and to get Membership Survey feedback. Our suggestion is to divide members of the "Leadership/Evaluation Team" into groups, with each group assigned to evaluate one of the Key Success Factors. That way, several tasks can get done simultaneously. But, don't let the process stretch too long. Aim to have your goal(s) and action plans completed by week six.

After the evaluation groups have made assessments of their assigned Key Success Factor, the entire Leadership/Evaluation Team should meet as a whole to complete the Lodge Self-Evaluation Worksheet. The evaluation groups will report on their respective assessments, but allow all team members to give some input to rating the performance indicators and success factors. When the Self-Evaluation Worksheet is complete, you should be able to determine the one or two factors for which the team will write goals and action plans.

Once the team has a consensus on the one or two factors to write goals for, it may be more productive to schedule one final meeting for everyone to formalize their ideas and to finalize the Action Plan(s) then.

Remember, the purpose is to establish priorities in one, no more than two, of the Key Success Factors. You want to FOCUS the whole Leadership Team on improving results step-by-step, rather than trying to do everything at once.

Tips on Scoring the Self-Evaluation Worksheet

Each Key Success Factor has five performance "indicators" which are given a value between 0 and 4 points based upon the evaluator's subjective judgement using the descriptive terms shown on page one of the worksheet. The five indicator values are added as the "subtotal" for that Factor category. The maximum subtotal for each factor is 20 (5x4=20) points.

Here are some words of advice for when team members are attempting to determine the point value of each performance indicator and they have differences in their individual ratings:



- Discuss the reasons for the differences in rating values.
- Use facts, more than personal opinion to support the rating.

- Discuss, but don't "haggle" over 1 or 2 points. If you can't reach a consensus agreement, take a vote and accept the majority decision.
- Don't "average" the scores to keep everyone happy. If you choose to average the scores arithmetically, round to the nearest whole number. Don't use fractions or decimals for an indicator rating.

- Remember, these are your team's evaluations, not the State/Regional Director's or Moose International's.
- The purpose is to identify opportunities for improvement, not to manipulate the points for a "good" score or a "bad" score.
- Neither are you trying to assign blame, you're working together to solve a problem.

LEADERSHIP and EDUCATION		COMMENTS:	POINTS
1.	The Lodge has a complete Board of Elected Officers?	<u>Complete</u>	<u>4</u>
2.	All Elected Officers have attended <i>Leadership Training</i> within the last 3 years?	<u>Two new officers & 1 chairman need to attend training.</u>	<u>2</u>
3.	The Governor has appointed Chairmen to all Standing Committees (as required by the General Laws).	<u>Need to appoint two Chairmen – Historical & Gov't. Relations</u>	<u>2</u>
4.	The Lodge is properly represented at District meetings and Association Conferences and Conventions.	<u>Governor should attend District meetings with ADM.</u>	<u>2</u>
5.	The Administrator has attended a Moose <i>Administrator's School</i> and/or an <i>Administrator's Basic Class</i> .	<u>Administrator is commissioned w/ 2 years experience.</u>	<u>3</u>
		Subtotal →	13

Ranking the Success Factors

Once each Factor category has been evaluated and scored, you're ready to determine the priorities for success. Transfer the category subtotals to their respective lines at the right of the box on page 3.

Next, rank each success factor category. In the boxes to the left, assign a priority ranking number 1 through 5. The factor with the lowest score should be labeled number one, the second lowest, number 2, and so on. The factor with the fewest points is your number 1 priority for improving the Lodge.

You can total the points to arrive at an overall rating. An overall rating scale below the total score simply gives you a benchmark of where the Lodge stands now, according to the team's collective judgement. In a few months, when the team has had the chance to work on some Key Steps to Success, you'll want to reevaluate the Lodge. You should see this overall rating improve.

The example below shows the completed evaluation scores and factor rankings.

Step 3: Write the category subtotals for each factor below. ↘				
Step 4: → Rank the 5 factors based upon Point Subtotals from lowest to highest. The factor with the fewest points is your #1 priority for improving the Lodge.	3	LEADERSHIP and EDUCATION	13	
	5	LEADERSHIP PERFORMANCE and DIRECTION	16	
	1	MEMBERSHIP ORIENTATION/ENROLLMENT & RETENTION	11	
	4	ACTIVITIES for MEMBERS	15	
	2	JOINT COMMUNICATION & COOPERATION	11	
		TOTAL SCORE		66

What Are the Key Steps to Success?

So, where do you start? Begin with the first step. You must decide if you want to improve your Lodge, and if this step-by-step process can work for you. Then, get other leaders from your Lodge and Chapter involved in the process. Meet with the team. Explain the purpose. Explain the process. Explain the Worksheet. Divide up and assign tasks. Set a timetable.

Take the Steps to Success

- ☒ Make a commitment
 - ☒ Make it a Team effort
 - ☒ Analyze, prioritize and set goals (FOCUS)
 - ☒ Set action plans in motion
 - ☒ Follow-through, Follow-up
 - ☒ Measure progress
 - ☒ Take the next Step to Success
-

To be certain, there is work involved. But, you might be amazed by what can get done when you get all the shoulders pushing on the same wheel. Help the team keep the FOCUS. Be sure to take time to celebrate your successes together. Then, "Take the next step."

A Few Words About What's "Missing"

We began by saying there are hundreds of jobs and tasks to do in a Moose Lodge. You may have noticed we haven't listed them all here. Some are very important parts of our mission as a fraternity. Just because we haven't discussed them in this narrative guide, doesn't mean they shouldn't be done, or that you should stop doing them while you focus on your steps to success.

For example, Community Service is not listed as one of the top five success factors. Yet it is an integral part of our organization's purpose. And, it is a factor in helping Lodges grow and become successful. Certainly, if your Lodge is already supporting good programs, they should be continued. Don't stop!

Excellence in serving their communities is a hallmark of outstanding Lodges. It helps them to "market" themselves, and is an important attraction in recruiting new members.

Also, there are relatively easy ways to participate in the Moose Six Point Joint Community Service Program. Contributing to Mooseheart and Moosehaven, making quarterly donations to the Mooseheart Scouting program or to the Youth Conservation Corps (YCC) are all qualifying community service programs.

Our aim here is to help those Lodges and Chapters that aren't achieving excellence; who are not in the Merit Award class, yet. The key factors we identified are what we call the "first tier" of success. The factors addressed here are ones that will help you get "your own house in order" first. Evaluating your Lodge, learning to work together as a team, setting common goals and action plans and working through them may be a new and different way of doing things for you. Making progress in these five key factors will help you build a solid foundation in your Lodge Home.

"Change does not necessarily assure progress, but progress implacably requires change. Education is essential to change, for education creates both new wants and the ability to satisfy them."

Henry S. Commager

Even if you're on the right track, if you stand still you'll get run over by the next train."

Will Rogers

As the team learns and grows together, as you find you are gaining in the key success areas, you will be better prepared and able to expand to another level of activities. Seeking out a family who needs the services of Mooseheart, participating in Government Relations, getting the Lodge and Chapter involved in the Youth Awareness Program are ways to move to the next tier of Moose Fraternalism. There are many more. Try them — one at a time.

It's time to begin the journey up the Key Steps to Success. It is a satisfying and rewarding trip. Enjoy it!