

Planning a Successful Masonic Training or Education Event

Successful Masonic training or education events don't just “happen”, they take a lot of careful planning.

We've all been to events for which some aspect has left us questioning, “Why did they do that?” The answer is that they probably didn't intend to, but they hadn't thought the whole process through.

If an event is well planned, you are better able to react to those unpredictable issues that can occur and manage the situation so that the attendees will perhaps not even notice. If an event is not well planned, every occurrence seems to be unpredicted and is treated like a crisis. The situation soon becomes overwhelming which leads to poor decision-making and ultimately a poor event.

The following framework will help structure the event to maximize your success.

Create a High Level Plan:

This is the concept phase where you must analyze your objectives and assess the availability of resources.

The plan should encompass all aspects of the event, including:

Why – Define the objective. Consider the topics.

What – Define the intended scope of the event - Lodge, District, Regional, Jurisdictional.
Determine the target audience: Open to all Brethren, Master Mason's Only, Ladies, Non-Masons?

Who – Strike the Committee; Select the Speakers

- Identify a Chairman who will provide the leadership and volunteers who will assist
- Identify potential speakers, presenters and a Master of Ceremonies or moderator

When – Time of year and the duration of the event

- Will this be a half-day, one-day or multi-day event?
- Select a range of dates to choose from - Give yourself enough time to plan!

Where – Identify possible locations

How Much – Establish a rough budget.

Spread the News – Describe a publicity plan - Brand Your Event

Quality – That extra effort that makes all the difference.

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Create a Detailed Action Plan:

During this phase, create a comprehensive plan for each element of the High-Level Plan noted above.

“What & Why” – The Scope:

- Determine the objective of the event
 - Is there a “theme” or just general education
- Choose the topics to be presented
 - Linked to the choice of speakers
 - Do you select the speakers and then let them choose the topics?
 - Do you select the topics and find presenters that can speak to them?
- Determine the size of event
 - Lodge
 - District
 - Regional
 - Jurisdictional
- Choose the audience – (Relates to content of topics)
 - All Brethren
 - Master Mason’s only
 - Prospective candidates invited?
 - Other non-Masons invited?
 - Ladies present? (or at separate functions)

“Who” - The People:

- Assign a Chairman with overall responsibility
 - Task the Chairman with coordinating activities
- Build a team to do the work
 - Assign duties to individual Brethren
 - Establish due dates for task completions.
 - Track progress at frequent intervals, even more often closer to the event.
 - Communicate progress to all people involved in the organizing
 - Ensures tasks are being completed
 - Avoids duplication of effort
- Choose a moderator or Master of Ceremonies for the event
- Choose a “Go To” person for the day of the event. This generally should not be the Chairman, MC or Front Desk personnel; they have enough to do already. The Go To person should be a committee member familiar with the whole event, who can put out fires.
- Choose the speakers and presenters
 - Send written invitations to the speakers with the event details
 - Request each speaker submit a précis for the advance publicity by a set date
 - Request a brief bio. or c.v. for introduction purposes
- Will there be a Keynote Speaker?
- Establish a dress-code and include with promotional material

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“When” – The Schedule:

- Choose the date
- The date might already be pre-set for a recurring event, but if this is a new event, be sure to consider the following before firming up your date:
 - Give yourself enough time! For larger events, you may need 4-6 months to plan
 - If you intend on inviting a Grand Line Officer, at least a year’s notice will likely be required.
 - Be aware of statutory and religious holidays
 - Avoid school holiday time periods (e.g., winter, spring-break and summer holidays)
 - Watch for conflicts
 - Other events in your District
 - In adjacent Districts
 - With the Grand Master’s schedule
 - With major Concordant Body events
 - The Masonic Calendar can help with this <http://freemasonry.bcy.ca/calendar.html>
 - Be aware of major social and sporting events – Grey Cup, NHL playoffs, Elections, etc.
 - You can’t plan around everything – but know your audience to gauge the impact
 - Confirm dates with key participants e.g., speakers, presenters, VIP guests, etc. – Request written confirmation, by e-mail or letter.
 - Ensure the proposed venue is available.
- Establish the duration of the event
 - Half-Day, Full-Day, Multi-day
- Establish the schedule for the day
- Set a duration for each presentation
- Leave time after each presentation for Question and Answer sessions
 - Encourage attendee participation
 - This can sometimes be the most productive part of the event

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“Where” – The Venue:

- Select and book the location.
- Lodge Hall, Hotel, Conference Centre, Community Centre, etc.
 - Provide for any venue contracts, permits, insurance, deposits, etc. that may be required.
 - Ensure availability of equipment required: projector, screen, AV-table, connecting cables/Mac adapters, laser pointer, extension cords, speakers, amplifier, microphones (lapel, hand-held, fixed), duct-tape for cords, white board, dry-erase markers & eraser flip chart & coloured marker pens, pens/pencils for attendees.
 - Sourcing this equipment from a hotel-like venue can be very expensive.
 - Can you source your own equipment?
 - Will the venue allow you to use it?
 - Have you budgeted for it?
 - Have a backup plan to provide those resources which could fail during the presentation
 - Confirm room set up: Classroom style, group tables, etc.
- Determine if the event will need to be catered and how
 - Make arrangements for coffee, tea, iced water etc. during breaks.
 - Will lunch or snacks be needed?
 - If so, by venue, outside caterer or self-catered
 - Will there be a bar?
- If Ladies are invited, develop a Ladies program

“How Much” – The Budget:

- Establish a detailed Budget
 - Your budget should incorporate estimates for all of the key items identified in your plan.
 - Include travel and accommodation costs for speakers, presenters, etc.
 - Will there be contributions from Lodges or District Councils, Masters and Wardens’ Funds etc. or will the event be self-financing?
 - Provide the ability to register and pre-pay for attendance (online sign-up, payment and tracking, on-site sign-in, etc.).
 - If there is catering required, pre-paid registration is essential to accurately gauging the attendance.
 - Over-estimating attendance at a catered event is a sure way to lose money
 - Under-estimating attendance is a sure way of upsetting your attendees

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“Spread the News” - Communication:

- Create a communications plan
 - Even with the most amazing speaker or entertainment line-up, you need an effective publicity campaign to get people in the door.
- State your objective – If you want your event to stand out, you need to choose a timely and compelling theme that sets you apart from your competition. This means that you need to come up with a dynamic overall theme and you need to take great care with the actual name – since it can be a key attention-getter, especially in online media.
- Brand Your Event – create a short, memorable branding slogan that describes the event.
- Define and advertise how your event is different from other events in your area
- Design a Logo: A logo can be an effective branding tool – offering immediate recognition of your event in all of your publicity and promo items (e.g., posters, T-shirts, water bottles, bags, etc.)
- Advertise to promote your event, both on-line and off-line, use **Multiple Methods to get the word out.**
 - Web page & on-line promotion through Social Media
 - Consider registration through Eventbrite - <https://www.eventbrite.ca>
 - The Masonic Calendar & E-Bee (Electronic Bulletin)
 - Printed programs, posters, flyers, signage, etc.
 - Phoning committee or direct e-mail
 - Consider personal invitations mailed to Brethren
 - DDGM’s, Grand Master’s or other Grand Line Officer’s Schedule
 - Word of mouth at Lodge meetings – “Good of the Order”
 - Send notices sent to be read in open Lodge
 - Make the RSVP method clear and easy to find

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“Quality”:

Those sometimes overlooked items that can make a big difference:

- Review and vet papers and presentations well ahead of time
- Inform the speakers of the type of audience and ensure they know to make their papers audience appropriate. For example, you don't want to have to ask the EA & FC attendees to leave the room because of the content of a paper.
- Encourage interactive sessions requiring the input of the attendees, rather having all lecture type presentations.
- Assign or recommend pre-assigned reading to the attendees
- Create and distribute a program or agenda
- Take advantage of other activities or entertainment opportunities available at the chosen location to make the event more appealing.
- Plan transportation: Parking, carpool, bus etc.
- Plan for a registration desk:
 - To be a general contact point for information and questions
 - To collect event tickets
 - To sell meal tickets
 - To distribute written programs
 - To distribute name tags
 - If attendees are preregistered, name tags can be printed in advance
 - This looks much more professional and can save time too
- Create a feedback sheet for the attendees to complete to assess the effectiveness of the presentations and their impressions on the overall event.
- Reminders re Cell Phones to be muted
- Announcements re Emergency Evacuation
- Advise washroom locations and ensure clear signage

Assess the Success of the Plan:

The event is closed in this phase that includes a series of important follow-up tasks

- Have a **Wrap-Up Meeting** after the event
- Recognize and reward the team members.
- A **Lessons Learned** session should be held with all parties.
 - Review the feedback that has been received from the attendees
 - Solicit thoughts and reflections from all committee members and from the speakers
 - Interview committee members: Where they over-taxed or under-utilized?
 - Evaluate whether the stated objectives were met
 - Review the Budget: How close were you?
 - Review the Communication Plan: What worked, what didn't.
 - Make recommendations for future events
- Send “Thank You” letters to the speakers