

## Commandery Business Plan Guidelines & Reasons

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These brief guidelines and justifications are not all inclusive, they are designed to give each commandery an idea of some of the essential components that should be part of an all-inclusive 5 Year Business Plan. Any organization whether business or fraternal should be using a business plan that doesn't begin and end with one term of an Eminent Commander. To be successful, the plan should set out reasonable goals which the commandery officers develop together, and continue to build upon year after year.

### 1-Who determines the business plan?

\*It should be determined by 5 key line officers, namely the Eminent Commander, Generalissimo, Captain General, and the two Wardens with input from the Treasurer and Recorder records.

\*The Division Commander should also review all commandery business plans for his jurisdiction and comments.

### 2- Why are there 5 key officers?

\*They are the established progressive officer line who have committed themselves to become Eminent Commanders.

It's important that they develop a cohesive plan that builds upon itself, and keeps the commandery focused for 5 years, with periodic modifications as necessary.

### 3-Any 5 year business plan must be reasonable, achievable, and reviewed monthly, quarterly, yearly.

\*The business plan activities and results of reviews should be communicated by the officers or committee chairmen who are in charge of any commandery activity/event. This means to all the officers and the commandery Sir Knights. Everyone needs to know what's happening.

\*Reports to the Division Commander are also necessary from the local commandery so that he can report to the Grand Commandery regarding commanderies of which he is responsible, and any proposed possible timely corrective actions taken.

Otherwise, the local commandery, its officers, and the Division Commander will all fail in their respective duties.

\*Periodic reviews or evaluations of commandery business plans can then be compared to what is happening in other commandery divisions which will contribute to any positive or negative trend understanding throughout the state.

4-Variables to consider when planning goals for the business plans:

\*Are the goals really achievable and reasonable? Don't overestimate or underestimate them.

\*if a stretch goal could be achieved, determine what is needed to achieve a stretch goal.

\*Have specific timelines established to achieve every goal. This will keep any commandery and division properly focused and more successful.

\*Have the commandery officers or committee members asked themselves a probing question:  
Can I resolve the issues/plans? If not, then who can best resolve the issues/plans?

These questions develop leadership characteristics, improve overall performance, and identifies the best Sir Knight to be in charge or other Sir Knights who are willing and able to work on committees.

\*Periodic surveys of the membership regarding any pertinent issues are necessary in planning and executing meetings, social events, and conferrals of the Orders.

\*Input/feedback all help in developing a better business plan but that feedback needs to be communicated throughout the commandery membership.

\*Cooperation and public recognition of mutual improvement ideas by the members ,and how they are going to be implemented are essential elements to have a successful commandery.

These above points/issues need a consensus of the 5 key local commandery officers for strengthening any commandery plans, as well as the entire commandery division.

5-Why is the plan for 5 years divided into months, quarters, and years?

\*Once the plan goals are established, everyone knows their participation, they need to be analyzed by the local commandery officers and division commander to make corrections on a timely basis, and why each segment of the plan must have an implementation timeline for completion. Otherwise, the plan will fail.

\*Many commanderies don't even have an annual plan and have haphazard terms.

6--The analysis process involves determining which elements of the plan were successful and which failed. The process can't be superficial.

\*Plans must include the real reasons for success and/or failure.

\*There are many variables that contribute to success or failure. They must be understood to correct future situations that may use the same or similar previous goals at another time in the future when better conditions exist for success.

7-Commandery membership needs are hardly considered and cause major challenges. Thus, each commandery needs to semi or annually analyze its membership.

\*Commanderies should divide the total membership into age categories to develop an understanding of those specific age categories, and to develop a target marketing practice to bring in new Sir Knights as replacements.

\*Replacements probably should basically come from an age category of 30-60 since they will tend to be the most active Sir Knights with steady employment, extra time, and have established family and financial obligations.

\*Other age categories shouldn't be forgotten. However, they may not necessarily be the most active Sir Knights, especially with the future younger generations or the more senior members.

\*The aforementioned information will come from the recorder and assist the 5 key officers with their target marketing plans.

8-Besides analyzing commandery membership manpower needs, the commanderies need to implement a system of forecasting the number of qualified potential candidates annually or

semi-annually needed to increase their overall continuous membership and financial positions. Part of this information comes from both the Treasurer and the Recorder.

\*Financially and ideally, commandery activities and expenses should be paid by the annual dues, and not from any investment accounts.

\*Dividends from investment accounts could also be used for expenses without drawing down from main investment accounts.

\*Based on a review of the past 3-5 year expense averages, the commandery officers could estimate a percentage increase for forecasting annual increase expenses to apply to each of the following years of a 5 year commandery business plan.

\*Manpower needs would also be projected in a similar manner to begin a program of increasing the needed number of Sir Knights in general, committee members, and officers going through the lines.

\*Dues, fees and other financial information should be reviewed at a minimum of once a year, and preferably semi-annually to keep from having any financial difficulties within the year or the future business plan years. The 5 key line officers must be vigilant regarding financial matters.

\*If necessary, a small progressive dues and fees forecasting increase could be established in the business plan based on normal price increases in the general economy for goods and services. This would be a rolling forecast and keep the commandery finances under control.

9-Consistent ritual and floor work schedules need to be established in the commandery business plan for the conferral of the 3 Orders, and communicated to all Sir Knights of the commandery, as part of the entire business plan.

\*This assures every Sir Knight knowing exactly what to expect during the specific year. Of course, there may be some slight modifications once a quarter.

\*This also obligates the Sir Knights to know their ritual in a timely fashion and don't try to rush anything at the last minute by doing questionable or poor performances with the candidates.

10-Proactive and up to date websites, emails, letters, phone messages or other communication means need to be consistently used to communicate with all members every month, as well as at the meetings. Without constant communications, attendance at monthly meetings or social activities will suffer.

\*Communications should not only be sent to the membership living close to a commandery but also to its members who may have moved elsewhere or can't attend meetings. This is an obligation of maintaining the Brotherhood of Sir Knights wherever they may be.

\* Business plan committee provisions for the widows of Sir Knights need to be included. Widows should be invited as the guests of the commandery to all social activities, meetings when public presentations are being made, and to see to their needs when necessary.

11-Commanderies should build in a monthly presentation on a variety of topics (Masonic, Templary or Non-Masonic) to maintain the interest of the Sir Knights. Families, and potential members.

\*Good programming increases attendance, retention of members, and new members.

\*If the business plan provides perceived value, then the cost of membership becomes secondary.

\*The actual meetings need to be short, not boring. Thus, the Eminent Commander and Recorder review the agenda before a meeting night or before it commences to decide what communications are important to discuss or discard.

\*Educational/informative programs could consist of any topic that might be of interest or benefit.

\*Programs should be open to the Sir Knights, their wives, widows, family members or potential candidates, current candidates, and friends who might be interested in Freemasonry or Templary.

\*The Knights Templars have had a unique place in history and men are interested in it. Therefore, provide good historical presentations in the business plans.

\*Ladies Auxiliaries have always been a column of support to commanderies. They have their own officers and plan activities to assist commanderies.

12-There should be some form of community relations project, ideally, at least once a quarter. Each event needs to be well publicized and pictures taken at the event for publication in the local news media, as well as the commandery website. These actions bind the commandery and the community in favourable public relations images, and should not be forgotten as part of the Knights Templar charitable activities.

\*Some activities might include disaster relief, feeding the homeless or starving children programs, food pantries-not just sending a cheque but actual weekend service, annual dinners for local police and fire departments, invitations to servicemen on military bases for a Thanksgiving or Christmas Luncheon/Dinner, assisting at marathons or cancer walks, donations for any charitable causes, doing something at Senior Centres or just asking the local chamber of commerce what assistance the Sir Knights could do for the local community.

\*By becoming involved, commandery and Freemasonry gain a better public image and it provides a bonding of our members with worthwhile activities.

13- Since commandery membership depends on the previous Masonic Bodies, commanderies need to establish a program to make public relations presentations in lodges, chapters, councils about Templary.

\*Escorts at lodge/chapter/council installations is one way, and unfortunately have not been done as frequently as they should be.

\*When visiting lodges, chapters, councils, try to dress in an Order of Malta or Knights Templar Uniform when making a presentation on those Orders.

\*Look for historical presentations, Holy Land discussions, and the Knights Templars who defended such areas as Malta, Rhoades, Jerusalem, etc.

\*Power Point or U-Tube presentations from USA and European sources contribute to knowledge, retention, increases in membership, attendance, and fraternal bonding.

\*Stress the Chivalric aspects/information of Templary as those universal characteristics made the Knights Templars famous throughout history.

\*Include visitations to other commanderies.

There is no limit to what can be developed and accomplished by a commandery over 5 years, if planned and implemented correctly. These suggestions or guidelines and reasons can and should be augmented or modified but the current 13 points will give any commandery a basic start to build upon.