

ALEXANDRIA VALLEY
ANCIENT AND ACCEPTED SCOTTISH RITE OF FREEMASONRY
Strategic Plan

As approved and adopted on 13 October 2017

VISION: To become a “university” of Freemasonry that motivates Masons to gain greater insight into Masonic history, philosophy, and symbolism, and inspires them to become leaders in promoting morality and civic virtue.

MISSION: To provide a Masonic experience for members that makes them better educated and more knowledgeable Masons, gives them a venue for fellowship with Masons from Lodges throughout the Northern Virginia area, and offers them meaningful community and philanthropic opportunities.

STRATEGIC GOALS:

- I. **Strengthen Membership:** Strengthen and maintain an effective program that results in a net positive membership trend.
- II. **Streamline Governance:** Optimize the Valley governance structure and processes to ensure long-term success and financial stability.
- III. **Expand Education:** Expand the Valley education programs to support a “Center of Excellence” for Masonic education and leadership training.
- IV. **Enhance Philanthropy:** Enhance the philanthropic activities of the Valley.

Strategic Goal I: (Strengthen Membership) - Strengthen and maintain an effective program that results in a net positive membership trend.

Membership focused Objectives and Actions that support the Strategic Goal:

Objective A: Attract more Blue Lodge Masons to join the Alexandria Scottish Rite.

Action 1: Membership Committee Structure – Re-structure the membership committees to align under a single membership chair and with separate sub-committees aligned to 1.) Attracting new members (Membership Growth); 2.) Engaging current members (Membership Development); and 3.) Contacting inactive and NPD members (Membership Retention). Provide clearly stated Mission Statements and Goals in Committee Charters. (Executive Council)

Action 2: Membership Committee Resourcing – Resource the membership committees with sufficient Brethren to effectively accomplish committee goals and ensure that each committee member has written, assigned tasks. Encourage the inclusion of newer Valley members on the committee to promote opportunities for involvement and encourage new perspectives. (Executive Council and Membership Committee Chair)

Action 3: Scottish Rite Representatives – Establish an active “touch” program to assign, engage, train, and support Valley Scottish Rite Representatives to each area Symbolic Lodge. Ensure that the Representatives have defined duties and responsibilities and a “Scottish Rite Representatives’ Handbook.” (Membership Committee/Membership Development Subcommittee)

Action 4: Annual Membership Report – With the assistance of the Secretary and Assistant Secretary create and distribute an annual report reflecting membership demographic information and trends to be used for membership growth, and retention. The report should address both current membership demographics and projected future trends. (Membership Committee/Membership Development Subcommittee)

Action 5: Membership Goals – Establish and communicate goals for new initiations, reinstatements, and attrition (NPD and demits), to be updated annually and published in the Annual Membership Report. Use these goals to drive and resource Membership Committees’ activities. (Executive Council and Membership Committee Chair)

Action 6: Value Proposition Working Group – Establish an ad hoc working group of interested members to develop and articulate the unique value proposition of membership in the Alexandria Scottish Rite. Use the output of this working group in the Blue Lodge Outreach Campaign. (Membership Committee/Membership Growth Subcommittee)

Action 7: Blue Lodge Outreach Campaign – Create a master plan for potential outreach activities and offerings that the Valley could establish or enhance as ways to raise awareness of the Scottish Rite in the Symbolic Lodges and attract new members. These activities could include ideas such as providing programs and meals for Blue Lodges, attending installations of Blue Lodges, creating training programs for Blue Lodge officers, etc. (Membership Committee/Membership Growth Subcommittee)

Action 8: Blue Lodge Night Program – Utilize the annual Blue Lodge Night program as an outreach and awareness vehicle for all Symbolic Lodges in the Alexandria Valley operating region. Through a new, dedicated Blue Lodge Visitation Committee (ad hoc) chaired by the Director of Work or his designee, consider options for enhancing the program and communicating the event with the Symbolic Lodges. Consider whether geographic rotation around the Valley could help draw more participation. (Director of Work/Blue Lodge Visitation Committee (ad hoc))

Action 9: Annual Introductory Letters to Blue Lodges – Send an introductory letter to the incoming Worshipful Master of each Blue Lodge every year to inform them of the Alexandria Valley's willingness to offer a program through the Speakers Bureau during their year in the East, along with the name of the Scottish Rite Representative in their Blue Lodge. (Membership Committee/Membership Growth Subcommittee)

Action 10: Speakers Bureau – Formalize a process to provide programs for area Symbolic Lodges when requested, focusing on the Scottish Rite and other Masonic topics. Create a plan to communicate this offering to the Symbolic Lodges (e.g., the annual introductory letter mentioned above, the Lodge Representatives, etc.), with a goal to present a program on the Scottish Rite at every Lodge in the jurisdiction every year. (Membership Committee/Membership Growth Subcommittee)

Action 11: Blue Lodge Breakfast/Lunch/Dinner – Establish an annual meal for the Masters and Wardens of the local Blue Lodges, perhaps capitalizing on an existing event such as the Blue Lodge event or a Division Leadership Conference. Use this event to educate the Masters and Wardens about the role of the Scottish Rite, and the resources available to the Blue Lodges, like speakers and education programs. (Membership Committee/Membership Growth Subcommittee)

Action 12: Special Reunions to Attract Distant Members – Explore options for holding a special Reunion at a location near the Highway 81 corridor to attract candidates at the western extreme of our Alexandria Valley jurisdiction. Involve the Scottish Rite Clubs in this effort. (Director of Work and Membership Committee/Membership Growth Subcommittee)

Objective B: Engage new Scottish Rite members to increase their participation.

Action 1: Mentors' Program – Enhance and formalize the current Mentors' Program to include a written standard operating procedure for actions and responsibilities before, during, and after each Reunion. Incorporate the Mentors' Program into the Membership Committee structure. (Membership Committee/Membership Development Subcommittee)

Action 2: New Member Name Badges – Provide each new member with a free name badge to wear to Valley functions for their first year of membership. Ensure that the Valley members understand that it is their responsibility to introduce themselves to the new members and make them feel welcome at all times. Also, allow existing members to purchase name badges at cost from the Valley. (Membership Committee/Membership Development Subcommittee)

Action 3: Offer Tours of the House of the Temple to New Valley Members – Schedule a guided tour of the House of the Temple to new Valley members and their families to engage

them after receiving their degrees and offer an opportunity for them to see the “crown jewel” of Masonic architecture. (Membership Committee/Membership Development Subcommittee)

Action 4: New Member Recognition Ceremony – Establish an annual or bi-annual ceremony to recognize the Valley’s new members and present rings, caps, or patents. Publicize the May and November dinners following the Spring and Fall Reunions to recognize the Scottish Rite members and their families. (Membership Committee/Membership Development Subcommittee)

Objective C: Provide reasons and opportunities for Scottish Rite members to be active in the Valley.

Action 1: VMAP Management – Incorporate execution of the VMAP efforts into the charter of the Membership Committee, with one committee member assigned as the VMAP Coordinator to ensure successful annual participation with ongoing progress reports and assessments and completion reports. (Membership Committee/Membership Development Subcommittee)

Action 2: Membership Survey – Conduct a regular survey to assess membership perspectives on Valley operations and programs as well as to collect suggestions for improvement. (Membership Committee/Membership Development Subcommittee)

Action 3: Member Incentive/Recognition Program – Establish a program that recognizes member participation in Valley activities, such as the Knight of the Double Eagle program. Create a wearable award or jewel to provide a tangible recognition for participants. (Membership Committee/Membership Development Subcommittee)

Action 4: Location of Valley Clubs – Use the Annual Membership Report to analyze the demographic trends in the Valley membership to see if the current arrangement of Scottish Rite Clubs is optimized to serve the needs of remote members. (Membership Committee/Membership Development Subcommittee)

Action 5: Encourage Participation in Valley Clubs – Supply the Membership Committee/Member Development Subcommittee with a current list of members living within 30 miles of each of the Scottish Rite Clubs and send postcards to these Brethren to encourage attendance at an upcoming meeting. (Membership Committee/Membership Development Subcommittee)

Action 6: Establishment of an Alexandria Honour Court – Establish an Alexandria Honour Court to provide a venue for Honourmen of the Valley to meet quarterly with their ladies and enjoy fellowship and a meal together. Consider using the March dinner as a special recognition for our Honourmen and consider expanding the event to off-site dinners. (Membership Committee/Membership Development Subcommittee)

Action 7: Personnel Staffing/Skills Review – Identify and recommend desired staffing requirements to ensure optimally qualified Valley members for specific jobs and committee assignments. Announce vacancies in the officer lines of the Bodies and cast a wide net for interested members to fill them. (Membership Committee/Membership Development Subcommittee)

Action 8: Promote LMIP – Promote LMIP to the membership as a way to make a ‘donation’ to the Valley and help support its long-term viability. (Philanthropy Committee)

Objective D: Improve contact and engage with NPD and inactive members of the Valley.

Action 1: Current NPD and Inactive Lists – Supply the Membership Committee/Member Retention Subcommittee with a current list of NPD members and inactive local members (within 40 miles of Alexandria) on an annual basis so that contact can be made by the Committee to encourage retention. (Secretary and Membership Committee/Member Retention Subcommittee)

Action 2: NPD and Inactive Member Outreach Analysis – Establish a survey of departing members and perform a comprehensive NPD and inactive member outreach analysis based on departing member survey results. (Membership Committee/Member Retention Subcommittee)

Action 3: NPD and Inactive Member Outreach Remediation – Create a coordinated remediation plan to address the findings from the NPD and inactive member outreach analysis, with the goal of reducing NPDs and demits. Place heavy emphasis on resourcing the Member Retention Subcommittee with sufficient Brethren who can contact inactive members. Engage the Scottish Rite Representatives to see if they can assist in contacting Brethren from their own Blue Lodges. (Membership Committee/Member Retention Subcommittee)

Action 4: Member Birthday Cards – Develop and implement cost-effective options for sending birthday cards or postcards to members from the Alexandria Valley. (Secretary and Membership Committee/Member Retention Subcommittee)

Strategic Goal II: (Streamline Governance) - Optimize the Valley governance structure and processes to ensure long-term success and financial stability.

Governance focused Objectives and Actions that support the Strategic Goal:

Objective A: Streamline and maintain an effective Valley Executive Council and committee structure as required to support policy coordination, implementation and oversight consistent with the Valley Strategic Plan.

Action 1: Executive Council Bylaws Update – Revise the Valley bylaws to read “The Personal Representative shall chair an Executive Council consisting of the presiding and number two officers of each Body, the Secretary, Assistant Secretary, Treasurer, the Chairmen of Standing Committees, and others as the Personal Representative may invite. The Executive Council shall meet bimonthly, or at the call of the Chair, to develop and coordinate policies and plans for the good of the Valley and to oversee progress in meeting the objectives, goals and actions described in the Valley Strategic Plan.” (Executive Council)

Action 2: Realignment of Standing Committees – Revise the Valley bylaws to describe five Standing Committees’ organization and functions, aligned with and supportive of the four following Strategic Objectives of this Plan: a. Membership Committee (Membership Objective); b. Budget and Finance Committee and the Communications and Public Outreach Committee (Governance Objective); c. Education and Training Committee (Education Objective); d. Philanthropy Committee (Philanthropy Objective). (Executive Council)

Action 3: Revise Standing Committee Charters – Revise Standing Committee charters to document organizational composition, functions and authorities of each Standing Committee including the participation in the governance objectives of the Executive Council as well as the consolidation of functions of previously separate entities as described below. Reconcile any discrepancies in Committee descriptions between the Valley bylaws and Committee charters to ensure consistency between the two documents. (Executive Council)

- Membership Committee: Describe one committee with sub-committee functions of Membership Growth, Membership Development, and Membership Retention. The committee would have responsibility for managing the Scottish Rite Representatives to the Blue Lodges, the Valley Mentors’ Program, member recognition programs, VMAP, annual membership reports, regular member surveys, and inactive and NPD member outreach. (Membership Committee and Executive Council)
- Budget and Finance Committee: Describe one committee to support the Executive Council governance responsibilities for fiscal planning, monitoring and reporting. Describe coordination with the Trustees, Audit Committee (ad hoc), and Financial Advisor as necessary for the development of comprehensive reports to the Executive Council and Valley membership. The committee will perform analyses and make recommendations to the Executive Council on investment options for funds held by the Valley Trustees, and on the sufficiency of the annual

membership dues to support the Valley operating budget. (Budget and Finance Committee and Executive Council)

- Communications and Public Outreach Committee: Describe one committee with sub-committee functions in support of: a. Executive Council communications with the Valley membership, including the bulletin and social media; b. Community Outreach Programs including the Outstanding Teacher Recognition Program and the Scottish Rite ROTC and JROTC Outstanding Cadet programs and other such programs designed to recognize community leaders and service providers; c. Valley Outreach Programs including the Ladies Appreciation and Widows Recognition programs; d. Valley web-based tools and resources development and management. (Communications and Public Relations Committee and Executive Council)
- Education and Training Committee: Describe one committee with sub-committee functions of Officer Training and General Membership Education (including support of Valley member participation in the Master Craftsman Program study groups), New Member Training, Valley Library Management and Valley Educational Program planning and coordination. (Education and Training Committee and Executive Council)
- Philanthropy Committee: Describe one committee with sub-committee functions in support of the annual RiteCare Childhood Language Program visit, Scholarship Programs, the planning and execution of Valley activities in support of the Annual Friends and Family Charity Dinner, and the Celebrating the Craft web-cast and other events. (Philanthropy Committee and Executive Council)

Action 4: Annual Committee Reports – Each Standing Committee will provide a written annual report to the Executive Council to document: a. committee membership composition and changes; b. status of assigned Strategic Plan actions, noting (b.1) significant activities and achievements in the preceding year, and (b.2) major plans for the coming two years; c. recommendations for changes to the Strategic Plan or the Committee’s charter based on achievements or lessons learned during the past year. The reports should be put on the Valley website after acceptance by the Executive Council, and as appropriate, an article on each Committee’s accomplishments could appear in the Valley bulletin. (Chairmen of Standing Committees)

Action 5: Trustees’ Duties – Revise Section 5 of the Valley bylaws to incorporate the following language regarding the duties of the Trustees: “The Trustees are empowered to form, under their auspices, ad hoc committees for specific approved facility enhancement projects with charter requirements detailing specific desired outcomes in terms of project performance, cost and schedule, as well as staffing requirements qualifications for the committee members.” (Executive Council)

Action 6: Annual Strategic Plan Progress Report – Annual Strategic Plan Report to the Valley Membership based on the consolidation of the Standing Committees’ annual reports and will include: a. progress made toward achieving the Strategic Plan’s Objectives, and its subordinate Goals and Actions; b. Significant events and accomplishments over the past year; c. Any recommended changes to the Strategic Plan. (Strategic Plan Committee (ad hoc))

Action 7: Participation of Valley Officers in Committees – Reinforce the requirement for line officers' participation on Standing Committees (as specified in the Valley bylaws for select committees) by reminding them of the officers' duties and responsibilities and communicating this to the officers at the start of every year. Committee Chairmen should be provided a list of officers from each of the Bodies who will serve as Committee members for the ensuing year. (Heads of Bodies and Membership Committee/Membership Development Subcommittee)

Action 8: Attendance at the Scottish Rite Conference – Have the Valley reimburse the cost of lodging at the annual Scottish Rite Conference for the Heads of Bodies. Attendance at the Conference should be a high priority for the Heads of Bodies and this should help encourage them to participate. (Executive Council)

Action 9: Selection of Valley Line Officers – Except when no other options exist, minimize 'recycling' of Valley officers between the Rose Croix, Council of Kadosh, and Consistory to maximize opportunities for new members entering the lines of the Bodies. Also, to the extent feasible, require all incoming elective officers of the Lodge of Perfection to have served in the East in the Rose Croix, Council of Kadosh, or Consistory, or in their Blue Lodge, Royal Arch Chapter, or Shrine, to provide an opportunity for leadership 'screening'. (Membership Committee/Membership Development Subcommittee and Heads of Bodies)

Objective B: Enhance the coordination, presentation and management of Valley finances and capital budgets.

Action 1: Creation of Mid- and Long-Term Financial Plans – The Budget and Finance Committee shall coordinate with the Trustees and Financial Advisor to prepare and present an annual report to the Executive Committee to include mid-term (3 year) and long term (5-10 year) financial goals and strategies. (Budget and Finance Committee)

Action 2: Annual Budget Presentation – Present the status of the current year budget and a proposed annual budget for the ensuing year to the Valley at the October meeting of the Lodge of Perfection for information, and at the December meeting for approval. (Budget and Finance Committee)

Action 3: Annual Audit – Present a written annual audit report to the Valley at the February Lodge of Perfection meeting. (Audit Committee (ad hoc))

Action 4: Cost of Living Bylaws Clause – Consider the use of a clause in the bylaws that automatically increases the Valley portion of the annual membership dues by indexing the dues to an appropriate inflationary measure. This will ensure that the revenue collected to support the annual operating budget will be sustainable. (Budget and Finance Committee and Executive Council)

Objective C: Improve communications between Valley leadership and the membership.

Action 1: Communications Committee Resourcing – Resource the Communications and Public Outreach Committee with sufficient Brethren to effectively accomplish committee goals and ensure that each committee member has written, assigned tasks. Encourage the

inclusion of newer Valley members on the committee to promote opportunities for involvement and encourage new perspectives. (Communications and Public Outreach Committee)

Action 2: Member Communications Plan – Solicit communication preferences from the membership via a survey. Using the survey data, create a Communications Plan with coordination of the Membership and Education Committees to provide current information to Valley members about upcoming events. (Communications and Public Outreach Committee)

Action 3: Website and Social Media Management – Appoint a website/social media coordinator to explore options for enhancing the Valley's social media presence with Valley members as well as with the general public. Assign several Valley photographers who can provide digital content to the coordinator through a cloud-based photo-sharing library. Appoint a webmaster to maintain the website, and a content reviewer to ensure content is screened for release. (Communications and Public Outreach Committee)

Action 4: Automated Phone/Email Notification System – In the communications survey (mentioned above), solicit member opinions and explore options for use of automated phone or email notification systems that would allow a reminder message to be sent to local Valley members for events such as stated meetings, Reunions, etc. (Communications and Public Outreach Committee)

Objective D: Establish a planning process for facility requirements to serve our future membership.

Action 1: Long-Range Facility Needs Report – Working with membership trend data and projections provided by the Membership Committee, conduct or solicit a study to provide an actionable analysis of projected facility needs, options and proposals focused on supporting the projected Valley membership in the 20- to 30-year range. The options should include consideration of alternate locations of the Valley Temple. (Board of Trustees)

Action 2: Long-Range Facility Upgrade/Replacement Management Plan – Create a plan predicated on the results of the "Long-Range Facility Needs Report" that will address the actionable elements of the report with (1) desired performance, cost and schedule boundary controls and (2) a major milestone schedule for initiation and completion of critical path elements with prerequisites/dependencies. (Board of Trustees)

Action 3: Property Use Working Group – Form a working group to investigate potential options to create revenue through use or development of the existing Valley property, consistent with local zoning regulations. Provide a written list of these options to the Executive Council for consideration. (Working Group)

Strategic Goal III: (Expand Education) - Expand the Valley education programs to support a “Center of Excellence” for Masonic education and leadership training.

Education focused **Objectives** and **Actions** that support the Strategic Goal:

Objective A: Build a robust education program for new Scottish Rite members.

Action 1: New Member Packet – Create coordinated Valley Administration, Membership, Charity, and Education information that can be provided to each new member at the Reunions. (Education and Training Committee)

Action 2: Reunion Class-member Training – Create a structured orientation training to members of each Reunion class to provide introduction to Scottish Rite organization, operational procedures and social and educational opportunities. (Education and Training Committee)

Objective B: Establish and maintain comprehensive education programs for the Valley membership.

Action 1: Education Committee Goals – Revise committee goals supportive of membership actions in Committee charter. (Education and Training Committee)

Action 2: Education Committee Resourcing – Resource the Education Committee with sufficient Brethren to effectively accomplish committee goals and ensure that each committee member has written, assigned tasks. Encourage the inclusion of newer Valley members on the committee to promote opportunities for involvement and encourage new perspectives. (Education and Training Committee)

Action 3: Member Education – Develop a comprehensive membership training program for the general membership based upon results from the periodic membership survey and input from the members. (Education and Training Committee)

Action 4: Master Craftsman Program – Enhance the current program to support and encourage participation in the Master Craftsman Program, and recognize Brethren who have completed at least one course. Add the requirement for all officers to complete at least the Master Craftsman I course before nomination to elective office. (Education and Training Committee)

Objective C: Establish and maintain comprehensive education and training programs for the Valley officers.

Action 1: Valley Officer Job Descriptions – Maintain the detailed description of each officer's function within each Scottish Rite Body and make each officer aware of his duties annually, including specific responsibilities and anticipated assignments in support of new/enhanced Valley programs and social events. Ensure that expected duties for elected officers includes attendance at the annual Scottish Rite Workshop (in March) and

Conference (in September) and the annual JMU Speech Clinic visit. (Education and Training Committee)

Action 2: Officer Training Program – Enhance the annual training for officers to provide incoming officers with information concerning assigned organizational leadership and management responsibilities as well as Scottish Rite and Valley regulations, the Valley strategic plan, ritual and operational procedures. (Education and Training Committee)

Action 3: Officer Advancement Requirements – Require appointed officers to fulfill a set of progressive requirements before nomination to elective office in the Bodies. This would include minimum requirements for Scottish Rite education, involvement and fulfillment of assigned duties and projects for their position in the line, and attendance at Valley meetings. (Education and Training Committee)

Action 4: Annual Officers' Retreat – As part of the officers' training program, consider an annual leadership workshop for all Valley officers to discuss preliminary officer guidance and expectations, goals, priorities, and challenges. This could be held on the same day as the Blue Lodge Event with the Valley offering lunch for all officers at noon, followed by a 3-hour session to discuss a structured agenda, followed by the Blue Lodge event. (Education and Training Committee)

Action 5: Ritual at Opening/Closing of Meetings – Direct the presiding officer to ritualistically open and close the stated meetings and Reunions from memory. (Education and Training Committee)

Strategic Goal IV: (Enhance Philanthropy) - Enhance the philanthropic activities of the Valley.

Philanthropy focused Objectives and Actions that support the Strategic Goal:

Objective A: Strengthen and expand current Valley philanthropic efforts.

Action 1: Philanthropy Committee Resourcing – Resource the Philanthropy Committee with sufficient Brethren to effectively accomplish committee goals and ensure that each committee member has written, assigned tasks. Encourage the inclusion of newer Valley members on the committee to promote opportunities for involvement and encourage new perspectives. (Executive Council and Philanthropy Committee Chair)

Action 2: Valley Philanthropy Giving Plan – Create a plan for the long-term management of the Valley’s philanthropic programs and activities. The plan should lay out the different philanthropic efforts, their funding sources, and the 5-year goals for each. The plan should also consider ways to engage the Valley through donations of time or funds to benefit the local community (e.g., the Masonic Angel Fund) and provide the Valley with a visible, charitable endeavor. (Philanthropy Committee)

Action 3: Expand Valley Participation in the Celebrating the Craft Event – Seek to involve more Valley members in the annual Celebrating the Craft Event through a dedicated subcommittee to organize Valley volunteers at the House of the Temple and to plan and organize a remote viewing event at the Alexandria Scottish Rite or other local venue. Advertise this event through early and effective communication to the membership. Solicit volunteers from the Blue Lodges, as well, and consider using this event to attract non-Scottish Rite members to see the House of the Temple. (Philanthropy Committee/Celebrating the Craft Subcommittee)

Action 4: Expand Friends and Family Event – Build upon a dedicated subcommittee to manage this effort under the Philanthropy Committee. Communicate a vision/mission for the event and establish a detailed project plan for execution. Create high-quality advertising materials for the event that also describes the mission of RiteCare and the Scottish Rite. Through soliciting outside sponsors for underwriting and item donations, expand the revenue base of the annual Friends and Family Event. Develop strategic relationships with other non-profits, and consider engaging these partners in planning for the event. Seek to also expand the number of paying guests by casting a wider net for advertising and ticket sales. (Philanthropy Committee/Friends and Family Event Subcommittee)

Action 5: Expand Current Scholarships – Expand the annual monetary commitment for the Valley’s current scholarships to graduating high school seniors by increasing the available funding. Ensure that scholarship funds paid out do not exceed the annual earnings earmarked for these purposes. (Philanthropy Committee)

Action 6: Promote “Amazon Smile” or Similar Donor Programs – Take advantage of the expanding online shopping industry to promote the “Amazon Smile” program to the membership. Promote awareness to the membership of this program and its benefits, and direct the funds raised from the effort into a philanthropic program that the Valley seeks to expand (i.e., scholarships, community charities, etc.). (Philanthropy Committee)

Objective B: Expand involvement of Valley members in philanthropic endeavors.

Action 1: Increase JMU Summer Language Clinic Attendance – Promote the annual JMU Summer Speech and Language Clinic visit to the membership as an opportunity to view the Valley’s primary charity in action. Remind the elected officers from all four Bodies that attendance is a part of their mandatory duties. (Philanthropy Committee and Executive Council)

Action 2: Encourage Gifts and Bequests to the Valley and Enhance Donor Recognition Programs – Arrange a speaker to discuss estate planning and charitable giving at a Valley meeting. Promote the range of options that the Valley has available to members to put monetary and other gifts to good use (scholarships, building fund, RiteCare, etc.). Create a recognition for Valley members who name the Alexandria Valley in their estate planning or wills, like the “Intendent of the Building Society” established by the Supreme Council. (Philanthropy Committee)

Action 3: Involve More Blue Lodges Through Inclusion in Fundraising Events – Extend invitations to all Blue Lodges to have their members participate in events such as the Friends and Family Event and Celebrating the Craft. Solicit volunteers from the Blue Lodges, as well, and consider using the Celebrating the Craft event as an “open house” or “bring a friend night” to attract non-Scottish Rite members to learn about the Rite and possibly also see the House of the Temple. (Philanthropy Committee)

Action 4: Provide Annual Report to Membership on Valley Philanthropies – Compile and present to the membership at a stated meeting an annual report reflecting the status and disposition of Valley philanthropic programs and activities, including planned future activities. (Philanthropy Committee)

Action 5: Reunion Presentation of Valley Philanthropies to New Members – Include information on Valley philanthropic efforts in the candidate education presentation at the Valley Reunions. Also, include a fact sheet and Supreme Council brochures on the philanthropies in the new member packets. (Philanthropy Committee)

Action 6: Improve Communications to Valley Members on Fundraising Events – Work with the Communications and Public Outreach Committee to find ways to communicate to the membership on ways to get involved with fundraising events. Break down the perception that only Philanthropy Committee members are needed to assist with the events. Consider assigning at least one officer from each Body to assist with specific fundraising events, and revise the Valley officer Job Descriptions to reflect this. (Philanthropy Committee, Communications and Public Outreach Committee, and Executive Council)