



## LEVEL 3: UNIT RESOURCES

Shape > Review and Plan > Reviewing your Unit

*The first stage in any plan is a review of your current situation, to identify issues that need attention, and which should be built into a plan. This applies to membership Units in Freemasonry (ie, Lodges and Chapters) as much as anything else. Throughout “Building Together” we refer to Lodges and Chapters as “Units.”*

This document, “Reviewing your Unit”, describes how a Lodge or Chapter can “take stock” and review their current situation, consider whether it is attractive to likely members and lay the foundation for a plan to shape the future. We recommend that every Unit return to this process at regular intervals, whether it is successful or is struggling.

Other materials in Building Together describe how to build Unit outlines and plans, attract future members and engage them in the life and activities of the Unit.

### GUIDANCE FOR UNIT MEMBERS

- Many Units carry on doing the same thing, meeting after meeting. Few collectively take stock of their practices and consider their future. Practices that were once attractive, enjoyable, relevant and appropriate can easily become dated. It doesn’t take long for a strong Unit to become stale, complacent and go into decline.
- Periodically, hold a series of meetings of your members to review your current circumstances and to discuss and plan your future.
- A good time to do this is during a break between regular meetings, when members may have more time and can direct their attention to making the best of the coming year.
- Invite all members to attend and encourage everyone to contribute, especially newer members. They will bring a fresh perspective and insight into the expectations and experiences of likely candidates and joining members.
- The first time you embark on this may require several meetings to complete the process.
- If any such meeting is held during a regular Unit meeting, it would be better that no visitors are present so members can speak freely.
- Arrange for a suitably skilled and experienced member to chair these meetings; one who cares about your future and who is prepared to let all others have their say, even if their suggestions appear radical to others. Select this member on the basis of their skills rather than seniority.
- The chairman may ask the Membership Officer (LMO / CMO) to assist in planning the agenda for the meeting or meetings, together with the rest of the Membership Team (if you have established one).
- Start by reviewing all aspects of your Unit, its culture and practices [see separate guidance document], and its procedures, to consider whether they are still appropriate and whether they will be relevant and attractive to future members.
- Examine the Unit’s **Membership Challenge** data for the previous five to ten years, this can be secured through your Provincial Support team. Discuss your different interpretations of this data, and especially what led to gains and losses. Consider whether there have been any underlying causes or patterns.



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- In your review, ask what is working well (ie, what is satisfying to all the members), what is not working very well (ie, what is not satisfying a number of members) and what could be improved (ie, how can the Unit be made more satisfying to current and likely future members).
- The “Example questions for a review” *[see separate guidance document]* provide you with a framework to cover all aspects of the Unit.
- A good way to start the review is to create an anonymous questionnaire for all members to complete.
- If you create the questionnaire as an online form, you can easily gather responses into one place, for analysis and presentation.
- You can then discuss the findings from the questionnaire at a further meeting, to reach some conclusions about the Unit as it is now, whether it is likely to attract and retain new members and how it wishes to develop in the future.
- Record the conclusions in a Unit outline, which will then form the basis of your development plan.
- See “Creating a Unit Outline” *[see separate guidance document]* and “Creating a Unit Development Plan” *[see separate guidance document]* for help on developing these.

## SUMMARY

- A regular review considers all aspects of the Unit and its activities, to determine whether it is still satisfying to members and likely to attract new ones.
- All members should feel able to contribute, ideally using a questionnaire followed by discussions to reach conclusions.
- The review, its findings and conclusions lead naturally into the next Threads, “Creating a Unit Outline” *[see separate guidance document]* and “Succession planning.” *[see separate guidance document]*.