

STRATEGIC PLAN

FOR THE

SCOTTISH RITE OF

FREEMASONRY

SOUTHERN JURISDICTION, USA

OCTOBER 2005



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**Mission Statement
of the
Scottish Rite of Freemasonry, SJ, USA**

It is the mission of the Scottish Rite of Freemasonry, SJ, to improve its members and enhance the communities in which they live by teaching and emulating the principles of Brotherly Love, Tolerance, Charity, and Truth while actively embracing high social, moral, and spiritual values including fellowship, compassion, and dedication to God, family and country.

STRATEGIC OBJECTIVE I

Fulfill the promise of additional Masonic knowledge through education and training

KEY STRATEGIES:

1. Establish training programs to provide on-going knowledge and skill development
2. Develop programs to train members in coaching and mentoring
3. Establish knowledge standards for all members
4. Establish resources for continued learning from a basic to advanced level

STRATEGIC OBJECTIVE II

Build a Positive Public Image of Freemasonry and the Scottish Rite

KEY STRATEGIES:

1. Establish a Public Relations Department
2. Expand the public awareness of our philanthropic activities
3. Establish a media relations strategy
4. Establish means to utilize well-known members to accomplish the objective
5. Establish initiatives to educate the public about the core values of the Scottish Rite

STRATEGIC OBJECTIVE III

Support and expand our philanthropic activities

KEY STRATEGIES:

1. Evaluate the current operating structure of our RiteCare[®] Centers
2. Establish standards of quality and care for our RiteCare[®] facilities
3. Establish operational national resources for RiteCare[®] Centers
4. Evaluate our scholarship programs and create standards

STRATEGIC OBJECTIVE IV

Provide a framework for effective leadership to ensure the stability and long-term success of the Fraternity

KEY STRATEGIES:

1. Review entire organizational structural of the Scottish Rite and evaluate its effectiveness, efficiency and utility for providing a platform for stability and a long-term success
2. Establish formal (and required) training programs for all levels of Organization, from Supreme Council to local Valleys to establish standard expectations of each position and provide training and skill development necessary to successfully hold the position
3. Improve and enhance communications capabilities throughout the Organization

STRATEGIC OBJECTIVE V

Provide a financial process to ensure the stability and long-term success of the Fraternity

KEY STRATEGIES:

1. Create an organization that has strong and progressive financial planning (short and long-term) capabilities for the entire organization (i.e. Supreme Council, Orients, Valleys, etc.)
2. Implement appropriate changes to the structure, policies and/or procedures that will result in strong internal accounting and financial controls to ensure the adequate protection of the Organization's assets
3. Implement a prudent, but progressive, investment policy, for all invested funds, which is built upon responsible investment theory and, which will optimize investment return in the long term
4. Develop policies and controls to manage the Organization's facilities in order to support the Organization's Mission while optimizing the economics of the investments in and the operation of the facilities