

ORIENT OF NORTH CAROLINA STRATEGIC PLAN: 2025

October 26, 2025 Working Version



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Sovereign Grand Inspector General, North Carolina



Timeline: Revised October 21, 2025

November 17, 2024	Announcement of ZOOM meeting of this Team
August 31, 2025	Final Draft from Orient Team Leaders and Directors of the Work
September 2, 2025	Distribution to Valleys
October 7, 2025	Strategic Plan, Job Descriptions, and notice of Restructuring delivered to Orient Chair
October 20, 2025	Final day for input from Valleys
October 26, 2025	Orient ZOOM meeting
November 1, 2025	Distribution of Final Working Version to Orient
November 22, 2025	SGIG shares information with Honor Court
January 1, 2026	Plan begins in each Valley
TBA	Orient Wide Leadership Summit updates

The Role of the SGIG in this Process

- **Strategic Planning**
 - To develop a Strategic Plan and engage the membership in it
 - To oversee the Strategic Objectives of the Supreme Council, Orient, nine Valleys, and the NCSRMF as needed
- **Volunteer Recruitment and Coordination –**
 - To identify Orient Leaders and assist Valleys in the same
 - To appoint Orient Leaders and Teams to conduct the work of the Orient
 - To oversee volunteers and coordinate their work consistent with the Statutes and the Supreme Council
- **Outreach and Networking –**
 - To identify the needs and connect the Valleys of North Carolina with the resources necessary to carry out the mission and purpose of Scottish Rite consistent with the North Carolina Scottish Rite Foundation and the Supreme Council, Southern Jurisdiction USA, Mother Council of the World
- **Program Development and Support –**
 - To address and resource Membership, Americanism, RiteCare, Masonic Youth, and Educational matters that relate to Scottish Rite Freemasonry
- **Reporting and Accountability –**
 - To complete the State of the Rite Report for the Supreme Council as required
 - To collect information from Valleys, compile, and share the State of the Rite Report with the Orient after filing it with the Supreme Council.
 - To provide leadership to the Orient Wide Leadership Summit, the Valleys, and the Orient at all times, delegating as necessary consistent with the current Statutes of the Supreme Council.
 - To plan and lead the Summer Orient Advisory Retreat as the “annual meeting of the Orient
 - To serve as the President of the North Carolina Scottish Rite Masonic Foundation
 - A set of job descriptions for Orient has been prepared and distributed as a separate resource. Valleys may adapt the resource to meet local needs.

2024 NCSRMF Mission and Purpose Statement

The North Carolina Scottish Rite Masonic Foundation is a 501.C.3 charitable organization dedicated to providing present and future benevolent financial support toward the training of licensed professionals and treatment of children with speech, hearing, and learning

disabilities who may receive services with little or no cost to families. Along with 170 such programs nationwide, we are achieving this mission through the generous support of our members, sponsors, and the public. In addition, North Carolina Scottish Rite members also support Masonic Youth organizations and victims of natural disasters recognized by the Masonic Service Association of North America. –No change recommended at this time.

Regarding Americanism: Tim Parker, 33°, Author

- What have you gleaned from Parts 1 and 2 of the strategic plans?

Part 1 is the focus on our obligation calling charity. A reminder that our kind offices extend to those who need our attentive work and assistance. The last part of the NCSRMF reminds us of our duty to prepare the next generation and to give to those in crisis. The Americanism message is that we are a uniquely American fraternity, in that we freely contribute because we are free to do so. We are not mandated or restricted by religious or political rules or laws. We give because we are blessed with the freedom to do so.

Part 2 establishes our core group of advisors and orient leadership team has the freedom and opportunity to do as much as possible to vet improvement and build unity of effort in tasks. Americanism can function at a higher value when members are working to build communication and enthusiasm through our Valleys and our charities. Americanism is only as strong as our ability to resonate with our 5000 members through our work and not just our words. Americanism should be woven into the fabric of our belief and work performance.

- Who is our intended audience?

The customer is the Craft and then those impacted by our work and output. Americanism is first education, and then the cultural impact of our lessons as witnessed by our actions. Illustrious Mike Daniels often reminds me that your faith is not real until you possess it as your own. We are Americans. What we do reflects who we have decided we really are. This must happen at the lodge and individual level.

- From Parts 1 and 2 of the Strategic Plan, what must the Americanism Team do to promote these goals?

The Americanism Team works at the orient level as committee, whose purpose is to vet recommendations on actions and process suggestion. The Americanism Team at the Valley level works to carry out the goals with the participation and consent of the valley leadership and members. The Americanism Committee shall communicate and create

strategy suggestion with Orient Leadership Team members to promote the accomplishment of those goals, consistent with the Scottish Rite Creed and Mission Statement of the NCSRME. This shall be accomplished by establishing specific working time periods consisting of long-term and short-term goals and objectives. It will be carried out by established communication and group planning, with realistic outcome objectives.

- What are the resources available through the Supreme Council to assist Americanism goals and Strategies?

We will look to Membership Services and Committees of the Supreme Council.

- What is the current conversation about Americanism?

The conversation at the orient level is whether the goals established in the Americanism endeavors are relevant at the Valley level. For a few Valleys, they support strong participation with leadership directed by the PR and supported by the committee and membership. It provides programs in which the valley has active participation as SR Masons in their community, where the lessons of the degrees can be acted upon in public and community activities.

- What is the effort of each valley to promote ROTC or JROTC?

This is under development, and we don't really know beyond legacy participation. This might be better answered by the PRs. Recent endeavors have each Valley requested to report number of awards and number of participating schools. The results of this will be better known with more accurate and reporting. This is a Valley functional area.

- What is the effort of each valley to be visible in communities promoting Americanism goals?

Inconsistency of reporting makes this difficult to assess. Suggested endeavors add opportunities to create efforts tailored to the Valley as well as those suggested by the committee. Where this is consistent, success multipliers always involve working with other organizations who are also participating in those activities as a community celebration. An example is collaboration with other appendant bodies for a parade, or festival or similar function.

- What is being done in each Valley to promote Americanism?

This should be briefed by the Valley PR or Americanism Committee representative. Valleys with success appear to also have the organization and presence of a committee

and the commitment to give that committee time and authority to function more effectively.

- How does web presence and printed material connect with our goals and objectives?

Web presence has the advantage over printed material simply because that is the evolving method of information flow. The Supreme Council has some great printed material but would have to be known and requested by the Valley. Some areas have more opportunities to celebrate Americanism because of significant historical history there.

- What are the best ways to help the Valley? Orient? Supreme Council? SGIG?

The Committee is committed to providing guidance and advice to endeavors to the Valleys. One underutilized resource is the orient newsletter. This is an excellent way to demonstrate your commitment to the public and masonry. We are currently providing the Valleys with an Orient list of special state events regarding America 250 and our celebration of the Declaration of Independence. The SGIGs Annual Summary is our means of reporting our accomplishments to the Supreme Council.

- How might we better utilize Facebook and YouTube?

Orient use of those platforms are good. The Valleys should do their own report card of the use of social media at large.

- What is the best information gleaned from the Supreme Council?

Greater efforts to attend these events are needed, especially now that there will be one every other year in Charlotte.

- How do we connect with subordinate lodges? Family of masonry?

Our Orient Teams through Project 100, Membership, Development, Strategic Communications, will focus more on this plan and share the findings and recommendations of Americanism as they develop.

Regarding Membership: Jeremy Hicklin, 32° KCCH, Author

- What have I gleaned from Parts 1&2 of the Strategic plan?

Part 1, our valleys have evolved overtime to fit their particular situation to best work and agree. By asking these questions we find where we need to work and better align all valleys while allowing each valley to have their own personality.

Part 2: Goes to define the roles and purposes of each group. This will help each group to better achieve their intended purposes and how to best work with each other as each group's purpose may overlap with each other's goals. By defining each role and purpose we can be better aware of when new roles may need to be created with future needs.

Ultimately the SOP will help future leaders, when newly appointed, to better understand the role and purposes of all Orient leaders and thus knock down the learning curve of that new leader. Also the SOP is something that can be shared with new Scottish Rite Masons who ask the good questions and better allow us to mentor new leadership. Our goal should be that we are all training our replacements in leadership.

- Who is our intended audience and purpose?

All masons are our intended audience and our purpose is to make new Scottish rite Masons by offering further light in Masonry, aiding our blue lodge brethren in fraternal assistance, and help children with our Ritecare charitable works.

- What must the Membership team do to promote these goals?

Membership must help coordinate programs and initiatives to help each valley grow in quality members whose Right Rite heart develops into participating and active roles within their valley. Growth in quality members will ultimately lead to the growth of quantity of our membership. This growth will ensure that not only will our goals be met, but will secure the future of our valleys with fresh new leadership for the future.

- What resources are available through the Supreme Council?

Membership services staff, development staff, and the library of Scottish rite publications

- What is the current conversation about philanthropy?

Project 100 is the leading conversation for philanthropy in NC Scottish Rite.

Developments plans to better use things like “FreeWill” and having conversations about estate planning will also strengthen our philanthropy and really get the brethren to think about legacy.

- What is the effort of each valley to retain membership?

All the valleys are working to improve retention by means of contacting members by phone, focusing on the brothers who are at risk of going NPD. Valleys are also working to clean the roles of deceased brethren, Wilmington is leading the charge on finding brethren who have laid down their working tools by manually looking for obituaries of deceased members.

Efforts have to be refined and improved for retention. We do not and should not NPD a brother without first having a conversation with him and we can not afford to carry brothers unnecessarily because of a lack of communication.

Recommendation for retention is for the Orient to develop a program where we can identify our deceased brethren in a timely manner, this will allow each valley to then be better focused on reaching out our living brethren and maintain our relationship which will in turn improve our retention. Possibly creating an auto-search of obituaries that can be used against our membership logs.

- What is the effort to reduce NPD?

See activities and recommendations under Question 6

- What is the process in each valley to increase petitions?

Each valley is using a grassroots approach of visiting lodges to help promote their valley. Some valleys use events like a Secretaries appreciation dinner, where they invite all blue lodge secretaries for a nice dinner and help to make sure they are aware of the Scottish Rite, with the hope that they go back to the blue lodge and share with the brethren.

Recommendation for the Orient: Every valley should help to develop and promote a formal and informal “ambassador” program. The formal ambassadors will be responsible for sharing a welcome to Masonry packet from the valley at 3rd degrees in their lodges and districts. The “Informal” ambassadors are each and every Scottish Rite Mason. This can be taught at our reunions, simply empowering each and every candidate with the knowledge that they are an ambassador for the valley and they have one job. When at a blue lodge meeting, when the Master asks, does anyone have anything for the good of Masonry? They can stand up and say “The Scottish Rite is here to offer further light in Masonry and aid your/our lodge in fraternal assistance.” This message repeated overtime will help ensure all NC masons know and are aware of the Scottish Rite.

- How does web presence and printed material connect with our goals and objectives?

Simply put, they ensure a consistent message to prospective and member Scottish rite masons alike. With consistent goals and objections, the orient will work or “row” in the same direction.

- What is the best way to help the Valley’s? Orient? Supreme Council? SGIG?

Finding, improving and implementing the best practices for retention and acquisition of Scottish rite members. It’s very simple: grow our valleys, grow the Orient, grow the Supreme Council and that will make the SGIG’s job easier. The best way to accomplish that goal is by developing the relationships within our fraternal order, we can not fool ourselves in chasing numbers and thinking we are growing our Orient. The relationship we hold with each other is the most important element.

- When reunions are complete, how well informed are new members concerning Ritecare? DeMolay, Rainbow? Disaster Relief? The NCSRMF?

Every valley has material and varying degrees of spoken information about each and every topic listed. The problem that valley leaders see is so much information is presented during the reunions, that most of this information is lost on the candidate.

Recommendation, possibly better developed by the Supreme Council, would be a series of learning modules sent to all newly made masters of the royal secret, that could have links that allow us to track who has and has not watched or read quick little information bits about each topic. Furthermore, valleys must promote the TOP LINE signer as the mentor of the new brother. We could develop a mentor checklist that we provide to all top line signers.

- How might we better utilize Facebook and YouTube?

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Obvious promotion of the platforms will help to connect our brethren, but we have to provide good, quality and engaging content. It can not just be the SGIG doing video messages. We need to include the newest members and find those who work with those platforms professionally to create quality content.

Recommendation: Create a script for a quick exit interview at the end of Reunions that could be recorded, shared and posted.

- What was the best information gleaned from Supreme Council sponsored workshops attended?

I was not able to attend any of the workshops, however I was at the Grand Commanders town hall in Fayetteville. His simple message that he is not worried about the quantity but rather the quality of new membership growth. With the realization that if we have quality new members, the quantity will take care of itself.

- How do we connect with the subordinate lodges? Family of Masonry?

We cannot be a secret within the Fraternity. Each and every blue lodge needs to be visited, more than once by the Scottish rite. We can offer education, simple introductions to our blue lodges. The Almoners program is the key to connecting with our blue lodges. We can help match the funds raised by a blue lodge for a brother in need of assistance. If we better used the almoner, we could create a lasting ripple effect for the Orient. Think about a brother sitting in a lodge, we pass the hat, he throws in \$20, lets say the lodge raises \$200 that night. At the next meeting the secretary announced that the Scottish Rite matched that \$200, because that is what we do! The next time the lodge passes the hat, the brother might throw \$40 because he knows that could turn into \$80. He also might hear of a reunion and his curiosity about this body that aids in fraternal assistance, even for non scottish rite brothers. A ripple could become a tidal wave. Furthermore, we can work with the House of the Temple to promote the Master Craftsman program for all blue lodge masons. Other jurisdictions have worked and provided free codes for the program for every blue lodge masons. This program will help lead to a united masonic experience, increased masonic knowledge and potential growth in the Rite.

Recommendation: Investigate offering the Master craftsman program to all blue-lodge members, with the help of the House of the Temple.

- How does Development connect with Americanism and Membership?

Development will help to create the cash flow to help develop the programs of both Americanism and Membership.

- How does RiteCare connect?

Charity is one of the most important pillars of Masonry, each and every mason has promised to be charitable. Taking care of children is one of the best acts of charity

anyone can commit too. The quality members/masons we are looking for, are going to be attracted to RiteCare. RiteCare and the almoner are probably the two most important parts of the Scottish rite that can be used to attract new members.

- How does Public relations connect?

Public relations is the communication leg for the message we want to provide to existing members and potential new ones. Without communication, we will continue to see decline in membership and participation alike.

- What is needed from the Secretaries of the 9 valleys?

The secretaries need to evaluate who is currently in the membership role for their valley and evaluate if they have the right brother in that position. If and when any changes to that role, quick communication needs to be provided to the Membership chair, SGIG and public relationship ASAP. We need the secretaries to then lean on the membership members to lead initiatives for retention and acquisitions of new members. We ask for an open mind and support of new or different ideas that could be utilized to grow the orient. Remember just because it is new, does not mean it's good or bad, only that it is different. Promoting the 3 topline signers gets them a free year of dues program.

Recommend creating a top line signer award for each valley and one for the orient overall. Working with each secretary to promote our TOP-top line signer will help to create a friendly competition for our stronger recruiting brethren and create an emphasis on sharing the Scottish rite opportunity to our brethren.

- What is being offered to the Secretaries?

Leadership to run programs that will improve retention and acquisitions. Quarterly communication of best practices of all the valleys for improved information and communication of who is doing what and the success and challenges faced by each valley.

- What is needed from the PR's?

Their support for initiatives, programs and ideas from the membership committee.

- What is being offered to the PR's?

Communication, growth and retention

- What do you believe will excite new members?

Ages 18-30: Esoteric and the deeper meaning of the degrees

31-45: Leadership development, and the esoteric

46-65: Leadership, fellowship, experience

65 and up: Fellowship, leadership, experience

- What do you believe are the most significant impediments for the current members regarding membership for members?

Ages 18-30 The feeling that the old guard just wants to BBQ and complain about the light bill. Sadly, I believe that many are concerned with old school racial views and if heard at a meeting, this could lead to many brothers not returning

31-45: Passing of the torch, old guard not wanting to hear new ideas about the future

46-65 being the bridge generation between the new and old guard and balancing where we have been to where we are going

65 and up: Feeling connected to the new generation in a world changing by the day. And for the older ones in this group, driving at night.

All ages struggle to feel properly communicated too, our challenge is how do we connect everyone.....phone? Email? Text? YouTube? Facebook? ETC

Recommendation: Create a comprehensive communication plan that allows for touches from the in person to the simple text message. Further thought is needed but needs to be developed by many well-informed brethren.

- What is the best way to get the message of your team across to the Valleys?

The members of the committee must be active in their respective valleys for the boots on the ground level. The committee has to work with the Public relations for a unified message and branding

- How do we teach valleys that they are part of the Orient and not an island?

More statewide events (Ie golf tournament, grand lodge table, statewide reunion) The more we work side by side, the more we know we are one team, not 9.

Recommend developing the regional model (East, Central, and Western) to create a more Orient feel for events across the state

- How will membership better utilize the YouTube channel?

Promoting the channel will be one of the flags of the membership committee.
Content is the key, so we need to be a part of that conversation going forward.

- How do we continue to be as effective in the SJ as we have been in recent years?

Kaizen: Continuous Improvement. We have to always look at policies, practices and look for ways to improve. When we rest on our laurels we fall, when built on them we will grow. Leadership across the board needs to open to new ideas, we have to be willing to fail at times in trying new ideas because often the best ideas grow from a failed idea.

- Does any of our leadership or team need clarification about who we are and what we do? Why or Why not?

No, because at the conclusion of the SOP, everyone will know and we will have no excuse not know who we are.

Final thought:

We do not have to sell the Scottish rite experience to keep old and obtain new Scottish Rite masons. We simply need to ask better questions which create intrigue and they will sell themselves. If anyone asks, why should I join the Scottish Rite? Ask them what they most desire? From there, they will ask all the right questions.

DIRECTORS OF THE WORK, Compilation

The following portions are a composite collaboration between the Directors of the Work and the SGIG. The Directors of the Work were named members of the Orient Wide Leadership Summit, effective January 2025 and will remain as such. Their combined concerns are reflected in the conclusions and recommendations which follow after review from their designated spokesperson and the SGIG.

Conclusions

- The Statutes do not permit degree work other than the 2004 Revised Standard Pike Ritual. The Supreme Council has made an exception to allow what is called the “Brunk 14th Degree Ritual” currently being used in three Valleys. Two of these Valleys also exemplify non-obligatory degrees that do not use the 2004 Revised Standard Pike Ritual. Their reason relates to the age of cast members and the decision of the Valley to not

“ruffle feathers” despite what the Supreme Council said. Thus, at the time, efforts to maintain cohesion were the choice over adherence to the Statutes.

- The Revised Pike Ritual enables quality, a standard, restoration of key concepts lost or obfuscated for a whole generation, brevity, uniformity, consistency, and speeding up the Reunions. It is the statutory standard.
- One Valley in North Carolina exemplifies all degrees 4-32, but not annually or semi-annually. It is spread over a month at a time and between Stated Communications.
- Six Valleys give Bridge to Light before the Reunion begins. This allows those receiving the degrees to have something in their hand to review, read, and reflect upon while waiting on degree teams or Class Directors to “keep the reunion” moving along. Three give the Bridge to Light after the Reunion. One of the three, for specific scheduling and educational purposes, do not put the book in their hands because there is constant activity with no “down” time. Directors of the Work agree to ensure, during breaks, that instruction occurs with no unnecessary downtime.
- All Valleys invite new members to participate in degree work. There is evidence that this could be more intentional and specific, given the identified needs in each Valley. Directors of the Work will get with Personal Representatives and encourage proper follow-up with every candidate who expresses interest in having parts from reunion surveys.
- While all Valleys have traveled to exemplify degree work, some find it not feasible now. Others are making it part of their annual planning and, in so doing, building better connections where it happens. Directors of the Work agree that Statewide Reunions are beneficial and encourage them to be done.
- Six Valleys have done “read-through” degrees at Stated Communications. All Valleys would benefit from such an educational program, which would give custodial workouts on how the degrees are officially handled, whether manuscript or electronic.
- Eight of the nine Valleys have made beneficial use of one-day reunions. Statewide Reunions have benefited six of our Valleys; that was the last time some traveled to exemplify a degree.
- Five Valleys plan to add non-obligatory degrees to their schedule. The best way to add degrees is to pair good ritualists with new members, start fresh, and tweak excellence moving forward.
- Three Valleys are concerned about the future exemplification of required degrees. Two of these Valleys use the Brunk 14th Degree ritual. One sees participation dropping post-reunion with degrees.
- Six Valleys use manuscripts, and only half have a solid, secure process for distribution. The other three are working on it. Four Valleys use electronic versions of the degrees, and

the tablets are not taken from where the degree is exemplified, or the Secretary keeps them when not in use.

- All Valleys have or are creating a process to secure official copies of the degrees.
- Five Valleys have expressed interest in the Missouri Cinematic Reunion and one Valley has used it successfully. One Valley has no interest, and the other three either need more information or would consider it under extreme circumstances. Directors of the Work request more information regarding this potential project.
- Valleys need to report their Reunion Schedule at all times at least two years in advance for communication purposes and planning and to give it time to adjust to other matters that could change, as it did this year with the rescheduling of Grand Lodge Annual Communication.
- Our Directors of the Work have a combined service experience of over 40 years. Our longest-serving DOW has 17 years of experience; we have three in their first year.
- All want more practice, participation, encouragement, and communication; membership increases; memorization or effective communication of the lessons, preferably both equipment, costume, and prop; and a better understanding of how to use electronics within the degrees.

Initial Recommendations, SGIG Author

- Directors of the Work are now a part of the Orient Wide Leadership Summit.

- The Directors of the Work and SGIG will discuss plans for a Statewide Reunion, perhaps on a regular basis. This Statewide Reunion may include a “4-30 event with Prince Hall,” coordinated between the SGIG & Deputy SGIG of the two Rites, with assistance from Directors of the Work.
- On January 1, 2026, all Valleys in North Carolina will have a “custodial” plan for the manuscripts and electronic copies of all degrees approved by the SGIG.
- By January 1, 2026, the SGIG, through the Personal Representatives, will develop a plan for officers of the four bodies to promote attendance, participation, and support of degrees in their respective bodies at reunions and all required Statutory feasts and ceremonies in their respective bodies.
- By February 1, 2026, all Valleys in North Carolina will have a plan to exemplify all degrees using the 2004 Revised Pike Ritual.
- Valleys are strongly encouraged to read through or exemplify degrees at Stated Communications. The host or a visiting Valley may do this.
- New members are encouraged or “positively directed” to form teams to exemplify degrees not currently exemplified.
- The required text Bridge to Light is given to each candidate at registration unless otherwise approved by the SGIG. Directors of the Work shall inform the SGIG how the time is filled between degree communications and exemplification to ensure no downtime if the Bridge to Light is not given to candidates at Registration.
- The Orient Thirty-Third Degree Team will continue, and the Orient will begin moving toward having an Investiture Team for the Knight Commander Court of Honor rather than placing all of the responsibility on one Valley.

- Three regional areas will be organized and, during Biennial years when there is no Summer Orient Advisory Retreat (SOAR), a one-day Workshop for Operations, Ritual, and Knowledge (WORK) with specifically planned agendas set by the SGIG and Directors of the Work for the morning and afternoon sessions. One will focus on Ritual and the other on Operations of the Orient. ***THESE MAY BE COMBINED INTO TWO EVENTS.***

Regarding RiteCare, Alex Edmisten, 32° KCCH, Author

• Strategic Planning

- Promotion and support of North Carolina RiteCare Programs
- To oversee all logistic communications from all university partners to the proper advocate.
- To assist Advocates by providing quarterly updates to each Liaison to communicate to the Orient membership all fundraising activities and events centered around our RiteCare Charity.
- To keep up-to-date funding information for the NCSRMF Board of Directors for distribution to our grantees and Masonic Youth organizations.
- To provide a plan of recognition, innovation, and structure for everyday use in the Orient of North Carolina

• Volunteer Recruitment and Coordination

- To assist Personal Representatives and Secretaries in identifying Valley members for the work of RiteCare
- To build and maintain a strong Orient-wide network of leaders and advocates who will contribute time and expertise.

• Outreach and Networking

- To connect all nine valleys through proper communications from the University Advocates through quarterly updates to each Liaison to communicate to the Orient membership all fundraising activities and events centered around our RiteCare Charity.
- To provide constant and consistent communication with each Valley NC RiteCare representative
- To keep the Personal Representative and Valley Secretary informed of all funding information involving the Orient of all distributions to our grantees and Masonic Youth organizations

• Program Development and Support

- To complete and successfully achieve all directives communicated by the SGIG of North Carolina for the benefit of the Orient involving all NC RiteCare activities.

• **Reporting and Accountability**

- To provide regular updates to the SGIG
- To be a member of the Orient Wide Leadership Summit (OWLS) and coordinate plans and strategic objectives with other members of OWLS as directed by the SGIG
- To provide reports as requested by the SGIG or Supreme Council related to the evaluation of the success of our programs
- To adjust strategic objectives when necessary.

How do we connect with the subordinate lodges? Family of Masonry?

- The Orient and NCSRMF will initiate a review and improvement of the availability of all material connected to NC Scottish Rite, Supreme Council, RiteCare, and NCSRMF materials to reach every subordinate lodge in North Carolina by July 1, 2026. RiteCare team members will assist in this endeavor.

What is the understanding we have of our university-related programs?

- There appears to be confusion regarding the proper procedure for scheduling campus visits. Effective immediately, all valleys are advised that campus visits are scheduled through RiteCare Team Advocates and the Chairman. This notice will appear regularly in the Orient-Wide Newsletter beginning in March 2025. Grants follow the Standard Operating Procedures approved and adopted unanimously by the NCSRMF in May 2024.
- The RiteCare Team meets quarterly and will discuss how to produce video information, including children and scholarship recipients, with more “stories” in 2025 after the Compliance Officer reviews it.

What is the vision for expanding RiteCare programs in North Carolina for the future?

- We must make NC RiteCare transparent, like the NCSRMF, so all involved can believe their contributions genuinely go to their intended purpose.
- Over the next five years, we will streamline and coordinate our procedures with other Orient Team members to ensure the success of our programs.
- We will explore and coordinate “university-based” fundraising.

- We will also include more representatives across the state, even getting our medical professionals who are Masons involved with our Charity.
- All of this will be part of our five-year plan.

How do we generate more passion and enthusiasm for RiteCare?

- It must begin with each Personal Rep and Secretary enthusiastically recognizing, innovating, communicating, and structurally supporting our daily charitable work.
- They regularly link to the now-required fundraising forms and information Orient Leadership shares.
- Our strategic objectives will include a plan to reach all 100 counties with RiteCare-related programs over the next ten years.

How is the Orient RiteCare program currently structured to address information sharing in our Valleys? Does this need to change? If so, how?

- The Chairman has “Advocates” connected with each university-based program and “RiteCare Representatives” from each Valley.
- The representatives receive monthly updates on NC RiteCare to share at the Valley Stated Communication.
- Beginning March 2025, the Orient Public Relations Chair, Development Chair, Compliance Officer, Valley Secretaries, and Personal Representatives will be added.
- As soon as possible, all social media outlets will receive regular NC RiteCare “Did you know” monthly posts.

How do we connect with the subordinate lodges? Family of Masonry?

- Much of our connection with subordinate lodges will depend on the work of our Membership Teams across the Orient and the willingness of masters of the lodges to allow us to deliver our message.
- Once we have improved the availability and supply of NC Scottish Rite, Supreme Council, RiteCare, and NCSRMF materials, the Chair of RiteCare will challenge all NC RiteCare committee members to do a quick RiteCare update at their stated.

Five Year Plans for RiteCare

- **Recognition**
 - To identify a methodology, including the Personal Representatives and Secretaries of the Orient, regarding how they can best aid and assist RiteCare. (2025-2026)
 - Working with the Orient YouTube and Facebook Team Members, we will develop “story-based” video information messages about our charitable endeavors (2025)

- Lead the transition “from RiteCare clinic to RiteCare program” and “partner to grantee” communication throughout the Orient of North Carolina.
- **Innovation**
 - To identify areas streamlining with other Orient Teams how to promote RiteCare throughout the membership (2026)
 - Working with Development and the NCSRMF, we will identify and establish
 - A “university-based” funding program across the Orient. (2027)
 - Identification and inclusion of medical and professionals who are Masons in the work of RiteCare. (2026)
 - A study involving appropriate Orient leaders will be appointed, and appropriate goals will be set after strategizing how the Orient of North Carolina might have a more charitable impact in all 100 counties of North Carolina. (2027)
 - Monthly use of Social Media Outlets with “Did You Know?” informational messages. (2026)
- **Structure**
 - To oversee all scheduled Scottish Rite visits to facilities where our programs are conducted relative to individuals, Valleys, or the Orient.
 - Through existing representatives, develop a plan to reach every subordinate lodge with our charitable opportunities. (July 1, 2026)
 - To continue regular scheduled ZOOM Team meetings and updates (2025)
 - Oversee updated and unified messaged print material for RiteCare communication purposes (2025)
- **Every day:** Evaluate. Negotiate. Justify. Oversee. Yearlong **ENJOY**

Strategic Communications, Rita Daniels, Author

Formerly Public Relations

• **Strategic Planning**

- To apply professional skills linking all technological matters for the Orient of North Carolina as approved and directed by SGIG
- To advise the SGIG and Orient Leaders regarding all matters that enable any web-based communication to be current, correct, and consistent with the messaging of the Orient and Supreme Council.
- To provide a plan of recognition, innovation, and structure for everyday use in the Orient of North Carolina

• **Volunteer Recruitment and Coordination –**

- To assist Personal Representatives and Secretaries in identifying Valley members for the work of Public Relations
- To build and maintain a strong Orient-wide network of leaders and advocates who will contribute time and expertise.

- **Outreach and Networking**

- To provide resource information and support to Valleys as they connect with the Orient of North Carolina and Supreme Council
- To communicate and support Valley webmasters and oversee their compliance with Orient and Supreme Council standards
- To maintain the email group lists as directed by the SGIG
- To coordinate and ensure consistency of Facebook, YouTube, LinkedIn, Tik Tok, and any other social media outlets with ncscottishrite.org, ncsottishrite.com, ncsrnf.org, ncgolftournament.org, ncgolftournament.com, ncritecare.org, ncritecare.com

- **Program Development and Support**

- To provide oversight and ensure responsible usage of all registered logos approved by the Supreme Council and North Carolina Scottish Rite Masonic Foundation
- To promote team building of “thinkers and doers”

- **Reporting and Accountability**

- To provide regular updates to the SGIG
- To be a member of the Orient Wide Leadership Summit (OWLS) and coordinate plans and strategic objectives with other members of OWLS as directed by the SGIG
- To provide reports as requested by the SGIG or Supreme Council related to the evaluation of the success of our programs
- To adjust strategic objectives when necessary.

Who is our intended audience?

- It’s not complicated. It is every Mason and anyone who cares for children.

What is our intended purpose?

- The purpose of the Orient website is ncscottishrite.org. is to provide:
 - Orient communication to the Public and all Scottish Rite Members on a high level, not deep into the trenches
 - A funnel of interest in joining the Scottish Rite to the Valley of choice and links to each Valley’s website for more information
 - A showcase of our philanthropies and our foundation, which will become links to corresponding websites for more information and, hopefully, donations
 - A quick utilization of the NCSRMF online donations link
 - Promotion of our Golf Tournament and all Valley fundraisers.
 - A connection with the resources of the Supreme Council available to our members

Why is our logo the way it is?

- It is a registered trademark of the Supreme Council 33° Scottish Rite Southern Jurisdiction, USA, Mother Council of the World.
- The official logo helps us prevent confusion between regular and recognized Masonic groups and clandestine groups. It is well recognized internally and externally. The 32 represents the number of degrees.

What is our intended action with the Orient Website?

- The intended action of the ncscottishrite.org website is
 - To deliver our unified, reputable, current, correct, and consistent public message
 - To drive membership (show all things the Scottish Rite does to pique interest in those Masons who are looking to get involved in something bigger than themselves - to care for children)
 - To increase knowledge of our philanthropies to the public and our members
 - To increase donations to the NCSRMF for our charities.
 - To help Valleys spread their word on what is going on in their geographic area of North Carolina, increase attendance and active members through a unified, reputable, current, correct, and consistent public message

What is our plan to popularize the website? Should/Has the Public Relations chair developed a team and strategic communication to Valley Webmasters?

- Beginning in 2023, we utilized search engines, social media, an orient-wide newsletter, valley websites, NC Mason, and traditional marketing tools to promote our unified, reputable, current, correct, and consistent public message and website.
- Thus far, the Orient has aligned with the Supreme Council and added our Valley websites and calendar dates.
- We have started developing a team of Valley Webmasters along with an organizational chart and communication plan that has:
 - Opened communication funnels from the Supreme Council to the Orient Public Relations Chair, then to the Valley Webmasters, and from the Valley Webmaster to the Orient Public Relations Chair, then to the Supreme Council.
 - Provided assistance and the latest updates required by the Supreme Council and the SGIG/Deputy to the Valley Webmasters.
 - Initiated general oversight on compliance issues and notification systems.
- In 2024, we grew the website audience using search engines, social media, the Orient-wide newsletter, valley websites, NC Mason, and traditional marketing tools to promote our message and website.

- As a result, Websites grew and honed into their message through the News webpage and newsletter, Valley Websites, orient and valley calendars, NC Mason magazine, Facebook, LinkedIn, Twitter links,
- An identified and subsequently appointed chairman created the NC Scottish Rite YouTube Channel
- The Orient Wide Newsletter Editor and Public Relations team developed Standard Operating Procedures and shared them with the Valleys.
 - Based on the SOP, our goals and strategic plan for 2025 and beyond includes
 - Continued interactive PDF availability of the Newsletter to drive traffic to ncscotthishrite.org webpages and Valley websites.
 - changing our main navigation verbiage to “Our Impact” rather than “Philanthropies.” We anticipate this will increase “click-thru.”
 - Working with the Membership Team, the Public Relations team will continue to utilize poster signage, t-shirts and polo shirts, and metal business cards at the Annual Communication to drive interest to [the ncscotthishrite.org](http://ncscotthishrite.org) website. JOIN
 - Identification of subject matter experts to begin creating interwoven websites with current, correct, consistent, and unified messaging with our three websites: ncgolftournament.com + ncritecare.org + ncsrnf.org
 - Communications plans have begun and are currently under construction.
 - Develop Standard Operating Procedures for the Public Relations Team and the areas currently under our umbrella.

How does web presence and printed material connect?

- The two must always be current, correct, and consistent.
- There is a direct impact across North Carolina with a unified message.
- Our printed materials will have QR Codes to drive visitors to our website(s)
- Our digital materials will be interactive (i.e., clickable), plus all marketing material will use the “one message” and properly registered trademarks by July 1, 2025

What are the best ways to help the Valley? Orient? Supreme Council? SGIG?

- Communication!
- Listen and Share information and ideas.
- Don’t assume; ask questions; the only stupid question is the one that you did not ask.
- Find the Chairs to develop a stronger team together rather than separately.
- Seek SGIG guidance and keep him in the loop.
- Initiate and establish communication channels from the Supreme Council to individuals and the Valley

How might we better utilize Facebook and YouTube?

- Currently, the communication channels between the Chairs are open with Public Relations. The goal in 2026 is to have these Teams operational in every Valley with coordination between Public Relations and the new Team as it forms.
- More content for both social media outlets is needed regularly. This may be accomplished by:
 - Asking Valley members to share videos to go onto the YouTube Channel
 - Asking Valley members to share Facebook posts with the Chair to add to the Facebook page. (not just the Valley Facebook page)
 - Having Valley members send articles/posts/events to the Editor. The Editor can direct those stories to the Public Relations, Facebook, and Communication chairs needing to go out immediately via the web and/or social media.

What was the best information gleaned from Supreme Council-sponsored workshops you attended?

- The “Framing the Future” conferences in Salt Lake City, UT, Kansas City, MO, and Jacksonville, FL, in 2024 were highly beneficial to all of our teams who attended. Beginning in 2026, these and future national conferences of the Supreme Council will be held in Las Vegas, Dallas, and Charlotte. As an instructor at the 2024 conferences, I gleaned the following:
 - The essential nature of a unified message across the board of lots of subjects. This was one message delivered to all 3 locations with question-and-answer sections per each section that was unique based on attendees. As well as a question-and-answer section with Commander Jim Cole, 33°
 - We do not need to waste time, energy, and resources reinventing the wheel. Instead, we need to work together to build on our strengths. In textiles, we learned that when you combine different
 - We benefit by participating in “Water Cooler Zoom calls” and other Supreme Council resources funded by per capita.
 - Attending these, along with the Supreme Council offerings and others worldwide, has opened up ideas, solutions, and problem-solving conversations on various subjects.

How does this position relate to marketing?

- Website Development is internet marketing at its finest. Even though the niche is the internet, it is interwoven into traditional marketing principles that work in unison.
- A web developer has to do many skill levels, both technically and visually, problem-solving, communication, constantly learning and adapting, and communicating the message, interweaving many outlets with one another to make a network of media outlets.
- It is feasible to consider a combination of Public Relations and Marketing as other areas under the Public Relations umbrella become their own Orient Team.

How do we connect with the subordinate lodges? Family of Masonry?

- Currently, nescottishrite.org's strategy provides information about who and what we are as part of the Masonic family.
- We also provide information to help young college-bound students find College Scholarships and Grants. We list all scholarships/grants from any Masonic Blue Lodges, DeMolay, Rainbow, Eastern Star, Amaranth, Shrine, York Rite, or Scottish Rite that would like us to publish on the site and link to their website for more information.
- Thus, we open communication between the organizations on a common ground.

Five Year Plans for Strategic Communications

- **Recognition**
 - Establish Public Relations is the core focus of a Team of appointed Webmasters in every Valley. (2025)
 - Create a message that is current, correct, consistent and ONE across all Valleys and the Orient of North Carolina. (2025)
- **Innovation**
 - Creation of an Orient Calendar accessible to all Scottish Rite Masons in North Carolina. (2025)
 - Design a Marketing plan to unify the message and work of our Valleys building on successes and learning from what doesn't work. (2026)
 - Promote Team building with leaders rather than "Lone Rangers" (2026)
 - Cross train leaders to assume leadership within three years if necessary. (2026)
- **Structure**
 - First Tier is Orient Leadership. Second Tier is Valley representatives working with Orient Leadership. Third Tier is other people interested in Public Relations for the Orient, at large, who become a pool of future leaders with Three Deep Leadership Model on every tier. (2027)
 - Quarterly ZOOM meetings of Tiers 1-3 led by Orient Leaders prior to OWLS quarterly meeting. (2025)
 - Create Standard Operating Procedures wherever needed. (2028)
 - Create Strategic Communication Team with Orient Wide Newsletter (OWN) Editor, YouTube Editor, Communication Chair, Golf Tournament Chair, and RiteCare Chair. (2026)
- **Every day: Evaluate. Negotiate. Justify. Oversee. Yearlong ENJOY**
Regarding NCSRME, Jim Brandt, 33°, Author

- **Strategic Planning**

- To apply professional skills linking all financial and record matters for the North Carolina Scottish Rite Masonic Foundation and how it impacts the Orient of North Carolina
- To advise the SGIG and Orient Leaders regarding all 501 (c) 3 financial matters consistent with the messaging of the Orient and Supreme Council.
- To provide a plan of recognition, innovation, and structure for everyday use in the Orient of North Carolina

- **Volunteer Recruitment and Coordination –**

- To work with the Board of Directors of the NCSRMF and the Director of Development for consistent messaging and action in the Orient of North Carolina as directed by the SGIG

- **Outreach and Networking**

- To provide resource information and support to Valleys as they connect with the Orient of North Carolina and Supreme Council
- To report any inconsistencies or web-based concerns immediately to the Public Relations Chair as it concerns any social media or nscottishrite.org, nscottishrite.com, ncsrmf.org, ncgolftournament.org, ncgolftournament.com, ncritecare.org, ncritecare.com

- **Program Development and Support**

- To advise and respond to the Board of Directors of the NCSRMF regarding actions to promote our charitable causes.

- **Reporting and Accountability**

- To provide regular updates to the SGIG consistent with actions of the Board of Directors of the NCSRMF and its bylaws.
- To be a member of the Orient Wide Leadership Summit (OWLS) and coordinate plans and strategic objectives with other members of OWLS as directed by the SGIG
- To provide reports as requested by the SGIG or Supreme Council related to the evaluation of the success of our programs
- To adjust strategic objectives when necessary.

Describe how the NCSRMF is structured.

- The work of the NCSRMF is defined in its bylaws and Standard Operating Procedures.

- The Board of Directors consists of nine members representing each Lodge of Perfection, the Orient Personal Representative, and two at-large members for twelve (12). The SGIG is the President.
- A Finance Committee receives and reviews grant requests, recommending action on the grant requests and an annual budget.
- The Statutes require all 501 C.3. funds to pass through it from Scottish Rite Valleys in North Carolina.
- 2025 will be the first year all Valleys are required to complete requisitions for reimbursement in charitable activities and reports on proposed and final results of fundraising activity

Describe the Annual Budget of the NCSRMF

- The annual budget development requires coordination with the SGIG, who is the President of the Foundation, the First Vice President/Chairman of the Foundation's Finance Committee, and the Orient Chairman of the RiteCare Committee, who coordinates grant requests from our clinics.
- Based on the prior year's revenue streams and spending levels and primarily the needs expressed by the clinics and Masonic youth groups through grant requests and requests for special projects that the Foundation wants to undertake at the RiteCare level and the Masonic Youth or Disaster Relief levels a recommended budget is set and agreed upon by the three principal drafters and presented to the Board of Directors of the Foundation for their discussion and approval at our annual meeting in September.

How do we receive funds? How do we disburse?

- Funds are received through multiple sources. One of our primary sources is the assessment made by the SGIG to the Orient Valleys based on the headcount at the beginning of the year and the assessment amount/member as established by the SGIG, which is currently \$10.00. The Valleys receive these funds in two installments and account for about 64% of our non-investment revenue.
- By far, our most significant source of income currently comes from our investment income on the endowment money held and invested on our behalf by the North Carolina Masonic Foundation. This has accounted for approximately 70-75% of our total revenue in the last several years. These amounts are automatically credited to our accounts through non-cash debits and are primarily used to increase the corpus of our Foundation resources which are currently about \$3,250,000.

- Another revenue source is an annual grant (\$5,000) from the Supreme Council, which contributes about 7% of our non-investment revenue.
- The Winston-Salem and Orient Golf Tournaments, currently a Valley and Orient fundraiser, respectively, contribute about 14% of non-investment funds and others throughout the year. This revenue source is growing yearly and is becoming essential to our operations.
Another source of funds is contributions by Brothers, Valleys, and others throughout the year, which represent about 15% of our non-investment income. This income is received through checks, electronic funds transfers, cash, credit card, and PayPal contributions. It is primarily used to fund our RiteCare, Masonic Youth, and Disaster Relief programs.

Other Relevant Information

- We still need to develop SOPs for receiving cash at some functions, such as contributions received at the Grand Lodge.
- All disbursements are made by check or electronic funds transfer. All checks require a dual signature, and the signers are provided with documentation for all expenditures.
- We will work with Compliance and others to develop these SOP's.
We disburse monies based on budget approvals and other special requests made by the SGIG and approved by the Foundation's Board of Directors.

How do we connect with the subordinate lodges? Family of Masonry?

- We can vastly improve our connection between connecting with our Valleys or the brothers in our subordinate lodges. Said another way, we are pretty good at hiding our light under a bushel basket. It wouldn't hurt to have a pamphlet describing the foundation's work and ways to interact with it. Additionally, a few road trips to the valleys and lodges would help provide information about the Foundation's work.

Five Year Plans for NCSRMF Secretary Treasurer, SGIG Author

- **Recognition**
 - Create Team to establish goals with Development to establish goals for recognizing donors (2025)
 - Create Team to establish goals \with RiteCare for recognizing special charitable support (2025)
- **Innovation**

- Establish regular online giving program for individuals at rate of 10 new donors a year (2026)
- **Structure**
 - Working with Development, assisting in securing Valley Development Team Members for Charitable and Long-Term Valley interests (2028)
- **Every day:** Evaluate. Negotiate. Justify. Oversee. Yearlong **ENJOY**

Compliance: Ranjan Varghese 32°KCCH, Author

• Strategic Planning

- To apply professional skills and oversight to all matters related to remaining in a “safe harbor” concerning 501 C.3. and HIPPA not limited to all forms and standard operating procedures of the Orient and NCSRMF.
- To advise the SGIG and Orient Leaders regarding all 501.C.3 financial matters consistent with the messaging of the SGIG, Orient, NCSRMF, and Supreme Council relative to all regulatory and operational matters.
- To review and assist Orient Leaders in their plans of recognition, innovation, and structure for everyday use in the Orient of North Carolina consistent with compliance with State and Federal regulations.

• Volunteer Recruitment and Coordination –

- To recruit and coordinate as directed by the SGIG

• Outreach and Networking

- To provide resource information and support to the SGIG, Development Director, Public Relations Chair, RiteCare Chair, and Board of Directors of the NCSRMF Valleys as they connect with the Orient of North Carolina and Supreme Council to maintain “safe harbor” compliance in all matters.

• Program Development and Support

- To advise and respond to the Board of Directors of the NCSRMF regarding any issues of compliance involving our charitable causes.

• **Reporting and Accountability**

- To provide regular updates to the SGIG consistent with the actions of the Board of Directors of the NCSRMF and its bylaws.
- To be a member of the Orient Wide Leadership Summit (OWLS) and coordinate plans and strategic objectives with other members of OWLS as directed by the SGIG
- To provide reports as requested by the SGIG or Supreme Council related to the evaluation of the success of our programs
- To adjust strategic objectives when necessary.

What is the reason for creating our SOPs for the NCSRMF approved in May 2024?

- To establish a framework of guidance/safeguard for the Foundation and its officers from potential legal or liability or other unspecified infarctions.
- Offers significant benefits, including protecting the organization's reputation, minimizing legal risks, fostering a culture of ethical conduct, enhancing donor trust, enabling early detection of potential issues, and providing a framework for accountability by ensuring adherence to relevant laws and regulations; ultimately, it allows the non-profit to focus on its mission effectively.

What is the source base for HIPPA implications regarding NCSRMF and RiteCare children?

- The Health Insurance Portability and Accountability Act of 1996 (HIPAA), Public Law 104-191, was enacted on August 21, 1996. Sections 261 through 264 of HIPAA require the Secretary of HHS to publicize standards for the electronic exchange, privacy, and security of health information. Collectively, these are known as the *Administrative Simplification* provisions.
- NC RiteCare Program (RiteCare Scottish Rite Childhood Language Program) has Clinical treatment centers and Academic Programs rendering services that are HIPPA-compliant policies and procedures.

How do HIPPA rules impact NCSRMF and RiteCare children?

- NCSRMF has fully executed the NDA between the grantor and the grantee while abiding by the HIPPA compliance policies of each center, where NCSRMF sponsors such programs to avoid potential liability risks for all parties.

With whom do you suggest that you work with on the Orient Team, and how does this laterally align in the Valleys?

- The role serves as a guide with varied oversight, determined by the President on an “ad hoc” basis.

Have there been compliance issues, and how were they addressed?

- None were reported as the role of oversight was recently created, and SOPs were established.

How do our forms address compliance issues?

- Approved forms with version edits are created to fully comply with NCSRMF's mission and enforced policies/procedures.

What was the best information gleaned from Supreme Council-sponsored workshops you attended?

- Only via communications from the President of NCSRMF.

How do we hold our funded programs accountable?

- By executing the flow chart specified in Funding Policies & Procedures (Refer to Page 4) and sections of the same.

What compliance issues are consistently in front of us as we promote?

- RiteCare- Implementations and adherence to the established process
- DeMolay- None defined due to unrestricted grant process.
- Rainbow- None defined due to unrestricted grant process.
- Disaster Relief- Implementing established process as needed
- Projects such as Lee County-To be determined

How do we connect with the subordinate lodges? Family of Masonry?

- Valley Ambassador Program
- Marketing and Promotional communications
- Sponsored events for family/members by Valley's in the orient, including formation of clubs to enhance engagement of subordinate lodges
- Recognize existing clubs to increase awareness-sharing of best practices.

Five Year Plans for Compliance Generalist

- **Recognition**
 - Oversee compliance issues that may/may not be addressed in activities of the Foundation or Orient (annually and “as needed”)
- **Innovation**
 - Assist the SGIG in continued compliance issues regarding IRS, HIPPA, Grants, NCSRMF forms (annually)
 - Review all new creations of charitable activities or Scottish Rite Clubs in the Orient (as needed)
 - Working with Public Relations, Communications, and the SGIG to have full and final say on any and all issues of compliance involving Orient or Valley matters. (immediately)
 - To assist the SGIG in development of “job descriptions” for all Orient leaders as they relate to the Valleys through the “Three Deep Leadership” program (2025)
- **Structure**
 - Assist Public Relations Chair in formation of a Marketing plan (as needed)\
 - Assist Development Chair as directed by SGIG (as needed)
 - Assist Membership in communicating compliance issues and programs designed to “grow” the membership. (2025)
 - Maintain the NCSRMF/Orient Flow Chart, adjusting it when needed (annually)
- **Every day:** Evaluate. Negotiate. Justify. Oversee. Yearlong **ENJOY**

Development: Barry Deutsch, 32° KCCH, Author

The Development Team Leader was aware of the work of all Strategic Planners and the questions they were asked and answered as well as any others who contributed to this document. He was directed by the SGIG to review and revise his final plan for presentation to the Orient in the format you now have. Please disregard any previous versions.

North Carolina Scottish Rite Development Committee

Strategic Plan

September 2025 – September 2026

1. Mission Alignment

The Development Committee supports the charitable and educational mission of the North Carolina Scottish Rite Foundation (501(c)(3)) by cultivating, soliciting, and stewarding major gifts from members and friends of the Scottish Rite.

Our goal is to ensure sustainable financial support for the Foundation's programs RiteCare, disaster relief, and support for Masonic youth.

2. Strategic Objectives

1. Identify High-Capacity Donors
 - Develop a profile of members and friends who are most likely to give at major-gift levels (\$5,000+).
 - Segment, where possible, the membership database by capacity, giving history, and engagement level.
 2. Cultivate Relationships
 - Create opportunities for personal connection between high-capacity members and Scottish Rite leadership.
 - Employ “soft incentives” that reinforce honor, exclusivity, and recognition.
 3. Solicit Major Gifts
 - Implement structured “asks” through SGIG, Regional Directors, and Valley leadership.
 - Focus on multi-year commitments where possible.
 - Consider bequests, Living Charitable Trusts, and other means of commitment.
 4. Steward Donors
 - Ensure meaningful follow-up, recognition, and ongoing engagement to strengthen long-term relationships.
-

3. Initiatives and Tactics

A. Donor Identification & Research

- Partner the Regional Directors with Valley Secretaries to identify 50–75 prospective high-capacity members statewide.
- Use peer-to-peer knowledge to refine and prioritize this list.
- Classify into tiers (Tier 1: \$25,000+, Tier 2: \$10,000+, Tier 3: \$5,000+).

B. Cultivation Programs

- Private SGIG Dinner Series: Quarterly dinners for 6–8 selected member prospects, hosted by the SGIG, Development Chairman, Foundation officials, or Regional Directors
- Double Eagle Society Expansion:
 - Entry level at \$5,000 commitment.

- Benefits: recognition at statewide events, exclusive lapel pin/shirt (to be determined,) name in Foundation Honor Roll.
- Exclusive Briefings: Webinars with leadership to share updates on Foundation impact.

C. Solicitation Strategy

- Pair SGIG with Regional Directors to conduct 10–15 direct solicitations during the year.
- Target goal: secure 10 new major gifts during the 2025–2026 year.

D. Stewardship & Recognition

- Publish annual Donor Honor Roll in print and digital formats, using Orient newsletter and web page.
 - Create “Thank You” touchpoints letters, emails, or phone calls at least 3x per year for all major donors.
 - Maintain a personal relationship log to track interactions with each donor.
-

4. Timeline

Fall 2025 (Sept–Dec)

- Create a donor prospect list.
- Launch first SGIG Dinner in Charlotte
- Announce Double Eagle Society enhancements via newsletter, website, SGIG letter to be read at Valleys

Winter 2026 (Jan–Mar)

- Conduct first round of personal solicitations.
- Host donor appreciation event during statewide reunion or more local gathering

Spring 2026 (Apr–Jun)C

- Evaluate progress toward 10 new major gifts.
- Second SGIG Dinner (Williamsport)
- Publish mid-year donor recognition report.

Summer 2026 (Jul–Sept)

- Close outstanding solicitations.
- Third SGIG dinner (Asheville)
- Prepare a final report for the Foundation Board.
- Recognize achievements at the September 2026 statewide meeting.

5. Measurable Goals

- Identify 50+ prospects by December 2025.
 - Host 3–4 private SGIG dinners with at least 20–25 attendees.
 - Secure 10 new major gifts (\$5,000+).
 - Increase overall major gifts revenue by 25% year-over-year.
 - Achieve 80% retention of existing major donors through strong stewardship.
-

6. Committee Responsibilities

- Chairman: Lead planning, oversee prospect identification, coordinate with SGIG.
 - Regional Directors: Provide prospect names, attend cultivation events, assist with personal solicitations.
 - Valley Secretaries and Influencers: Supply data and facilitate invitations.
 - SGIG: Serve as the visible figurehead for donor cultivation and recognition. Be the face of the Foundation
-

7. Risks & Mitigation

- Risk: Lack of engagement from high-capacity members.
Mitigation: Offer multiple recognition paths (social, honorific, charitable impact).
 - Risk: Valley inactivity.
Mitigation: Set quarterly accountability check-ins with progress reports. Encourage Regional Director visits to Personal Representatives and Valley Secretaries.
 - Risk: Overreliance on SGIG availability.
Mitigation: Empower Committee Chair, Regional Directors, and Foundation chair and board members to host events when necessary.
-

8. Conclusion

This plan provides a focused roadmap for the Development Committee to secure significant philanthropic support for the North Carolina Scottish Rite Foundation over the next few years. By targeting wealthier members, fostering relationships through honor and recognition, and implementing a disciplined solicitation and stewardship strategy, the Foundation will strengthen its financial base and advance its mission for generations to come.

INITIAL SGIG REFLECTIONS AND RECOMMENDATIONS SUBJECT TO REVISION

- Identify and involve all who want to participate and be at team player.
- We need to present the newsletter in a more favorable light at the Valley level every meeting.

- We need to identify all access matters and correct this as soon as possible
- Advisory Conferences need to closely examine operational expenditures and budget accordingly since there is no minimum dues requirement.
- Proper use of logos, SOPs and connection to NCSRMF must be encouraged and done.
- More encouragement of attendance at SOAR for all Scottish Rite Masons is encouraged.
- Expansion of OWLS is forthcoming.
- Honors Weekend changed to Red White and Blue has happened.
- Members are encouraged to transport older members to and from meetings and events.
- Intentional team building needs to happen at Orient and Valley level.
- Publicize Supreme Council events like the RiteWay Conferences, Quarterly Zoom Meetings, and Water Cooler chats and encourage participation
- YouTube will begin building its Orient Team at Valley level in 2025 to help promote the “UNIFIED MESSAGE” to enhance and distribute information related to our purpose and awareness across the state
- Have the YouTube team do a series on “What, Why, How the Orient of NC works and provides charitable support for children.”
- Plan for future vacancies in positions by promoting SGIG three deep plan for future team members and leaders.
- ALWAYS be expanding the network connections and develop leadership
- Utilize QR Codes, business cards, T-shirts with OUR message.
- Promote the Supreme Council Scholarships and programs and those within the Grand Lodge of North Carolina and the Masonic family of
- Promote ncscottishrite.org, coordinated posts on Valley websites and Facebook, informational video on YouTube channel, Facebook, Websites
- Improve web presence and personal presence with Masonic Youth
- Quarterly updates from Masonic Youth Organizations, similar to current plan for RiteCare
- Include Rainbow and DeMolay in Orient activities and invite them for Valley Programs.

- Engage in conversation with both organizations to discern how we and they might be more “present” for one another.
- Develop and promote all websites under our umbrella so they are current, consistent, and correct with a UNIFIED message on all three.
- Connect by link with other appendant organizations or Grand Lodge
- Inform members of existence and encourage them to go to the sites
- One message with specific purposes clearly defined by all websites
- Current, correct and consistent message on these sites with brochures with NCSRMF focused more on the benefits we provide.
- Continue to engage involvement of our members and sharing of information to move people from the middle toward more participation and eliminate unnecessary delays
- Continue to share the impact and success stories of the Orient.
- Timely response to guidance from OWLS and support are critical at every level. There has been much improvement in this area in recent times.
- Be attentive that other Orients are “watching” North Carolina and inquiring almost weekly on our practices that they wish to implement
- Build the “I” in TEAM. Integrity, Integration. Information. Intelligence
- Stay in our lanes while working together for a unified purpose and stay current, correct, and consistently learn from each other to cooperate rather than compete.
- There is more confusion in the Valleys than amongst the leadership team itself. Orient leaders are the ones to help this improve.
- If everyone has their own idea and goes off doing their own thing without coordination with the rest of the group, problems are certain
- Our teams are dynamic and designed for success
- Our teams can constantly improve
- *There will be more to come after October 20, 2025.*

Conclusion

First, I want to thank our Team Leaders, our Directors of the Work, and our Orient Officers for contributing to this Strategic Plan. We are grateful to them for their thoughtfulness and precision in developing these plans.

Second, the SGIG intentionally chose the process for how this report would evolve, ensuring it would indeed be a grassroots report rather than a top-down one. The next step is to secure feedback from the Valleys in September and October. Any input received after October 20, 2025, will be referred to an Orient Strategic Plan Committee, which will be named at a later time. Each Advisory Conference or its Strategic Planning Committee must review this resource document and utilize it effectively for its respective valley. One size does not fit all, but one size is our Orient, and if there are things a Valley can use from this report, so much the better. The only mistake a Valley can make is to ignore the resources that could help it.

Third, North Carolina is highly dedicated to excellence and will create a “workable and ongoing” plan for the Valleys and Orient of North Carolina, which existing and future leaders can implement. This Strategic Plan, along with our Orient Restructure plan, the Orient Google Calendar, and the previously submitted and up-to-date “Job Descriptions,” will enable smoother transitions in the future. With these tools at our disposal, our plans, defined roles, and improved connections with subordinate lodges will give us consistent, current, and coordinated communication with the public.

Fourth, the October 7, 2025 Version is the authorized version the SGIG delivered to the appointed Chair of the Orient Strategic Plan Team for his preparation for future review, revision, and response as directed. The Valleys will respond by the October 20, 2025 deadline. At that time, the SGIG will begin addressing the “Orient Restructuring Plan” with attention to regional Valley support and, in consultation with the Chair, Illustrious Steve Pendergrass, 33⁰, the Orient Strategic Plan Team. The updated version of the plan will be submitted to him after October 20.

Finally, the designs on our trestle board are not set in stone. They are part of a “live document” that may change over time. Masonic leadership depends upon surrounding ourselves with the best support system we can create. Whether it is the Master of our Lodge, the Grand Master, the Sovereign Grand Commander, the Sovereign Grand Inspector General, or their appointed leaders, our investment into this process as an Orient will pay dividends in the future. Our present will, one day, become our glorious past because we see the light of a brighter future that will soon be our present. It is so true that “Together, we RISE! Therefore, with the “Right/ Rite Heart,” let’s go to work.

Pre-Orient Release