

Ten Year Strategic Plan

INTRODUCTION

This Strategic 10-Year Plan (beginning in 2021) below is an idea submitted to the LRP Committee by ILL Bro Lance Otis and Bro Jason Reeder after hours of research and thought gathered from various sources. Ideas herein come from other Valleys across the US, Fund Raising Ideas, and a deep desire to see our Valley succeed. We are in a unique time as in person meetings/fundraisers most likely will not happen until Q2/Q3 of the 2021 year.

VISION STATEMENT

To be the Masonic center of Scottish Rite excellence in Washington; led by motivated, forward thinking men of Masonic character and to make a positive impact on the quality of life for its members and society at large by teaching and practicing traditional moral, ethical, and Masonic values.

MISSION STATEMENT

To attract, retain and develop Freemasons through proactive leadership, citizenship, and benevolent programs which ensure that brotherhood is the peculiar characteristic of Freemasonry; that its principal tenets are brotherly love, relief and truth, that we are one sacred band or society of friends and brothers who have but one aim and that is to promote peace and harmony among ourselves and neighbors.

To create viable sources of revenue beyond investments and membership dues for both in-person and virtual events.

I. LEADERSHIP

1. Adopt and Implement and the use of position descriptions for our four bodies Officers referencing the BVSR DAR Dated 11.22.2013 **Goal: 2021**

Each officer has a specific position description which describes the duties and responsibilities of his office. And those should be referred to in Ref (a) of the BVSR DAR.

2. Create a set of objectives and goals for the various committees. **Goal: 2022**

Officers work with committee chairmen to establish separate charters which define goals and broadly outline the processes necessary to accomplish the purpose of each committee. This will identify to each chairman what his committee needs to accomplish and allow him to implement the specific method by which to attain said goal.

3. Improve effectiveness of officers and committees. **Goal: 2022**

Establish a process to identify and provide a review of Scottish Rite activities and provide feedback to officers and committees. Such constructive feedback should harmoniously enhance the performance of officers and committees.

4. Solicit and encourage all elected officers to attend all Leadership Conferences and other Supreme Council sponsored activities. **Goal: 2023**

All officers are encouraged to attend Scottish Rite Leadership and Membership conferences whether they be in-person or virtual. The Valley should ensure that all officers receive timely notification of Scottish Rite Leadership and Membership conferences including date, location and cost information. Registration, transportation, lodging and other costs will be the responsibility of the individual. This will enable future presiding officers to have a solid framework upon which to conduct their year as presiding officer in their respective Body.

5. The Executive Committee shall establish a "Committee of Leadership Training" within our own Valley. **Goal: 2024**

Committee for Leadership Training: Officer Training in BVSR Lodge Management Proficiency: Officers should show a core competency in the management of Bremerton Valley business beyond that provided by the Blue Lodge. Action: Gen Sec Designate a responsible Chairman to develop a proficiency program. Lecture volunteers could include the SGIG and Supreme Council representatives as well as the key committee chairmen. Training should include Addendum A.

6. Continue to conduct joint Executive Committee/Advisory

Committee meetings. **Goal: 2021**

These joint meetings should be monthly. The Office will provide timely notice and prepare agenda items. **Goal 2021**

7. List new chairman: Chairmen for new committees are needed:
 - a. Leadership Training.
 - b. Outreach Chair / Guest Speaker Chair: see below and Community Relations item 2.
 - c. Social Director: see Member Retention item 4.
 - d. Chamber of Commerce Char: see Community Relations item 1

II. MEMBERSHIP (MAINTENANCE)

1. Support the Sickness Welfare & Relief Chairman in his efforts to converse with those in need. **Goal: 2021**

Members of the Valley will report any known need to the Almoner prior to each Stated Meeting regarding the ill and visitations to them.

2. Use the Membership Committee to contact dues-arrears members to investigate reasons for non-payment of dues. **Goal: 2021**

The Membership Committee through their communication with non-dues paying members may be able to determine how certain non-payment trends can be alleviated and provide data for remission of dues.

3. The Public Relations Chairman will make certain that all communications provided by the General Secretary are reflected on the website or via the newsletter if one is published. **Goal:2021**

It is essential that communications be provided in numerous formats to ensure the Valley is well informed and apprised of current situations.

MEMBERSHIP (NEW)

1. Hold "Rush Party" at least once every year. **Goal: 2021**

Local Freemasons will be invited to the Scottish Rite for a special information session with food and entertainment. Invitations to join the Scottish Rite are currently on a one-to-one basis.

The Venerable Master of the Lodge of Perfection will be delegated the duty of producing the "Rush Party." This is in line with the proposition program as outlined in the Forms & Traditions.

2. Provide assistance to Symbolic Blue Lodges in conferring the work and in candidate instruction. **Goal: 2022**

The Scottish Rite will secure volunteers for this assistance and offer this help upon request. Scottish Rite Masons who are well-skilled in Blue Lodge degree work and candidate instruction will be available when asked to participate in the program to assist local Lodges with these items. The Wise Master of the Chapter of Rose Croix, should be tasked to develop the list of volunteers, secure advertisement and provide assistance as our ability permits.

3. Provide for the Creation of a Speakers Bureau to conduct educational programs. **Goal: 2022**

The Commander of the Council of Kadosh will be tasked to secure volunteers that are skilled in speaking, and knowledgeable in the history and lore of the Fraternity. Lodges and Community Organizations will contact the Scottish Rite for programs.

4. Create highly mobile degree teams for the Mandatory Degrees. **Goal: 2023**

Organize a "Mobile Strike Force" that can duplicate members of degree teams, and minimum needed sets and props in order to confer the mandatory degrees in lodge rooms or via Zoom throughout the Valley in order to solicit members in distant communities that otherwise would not come to the Valley for degree work.

5. The Membership Committee Chairman shall work closely with the DeMolay Representative for future membership. **Goal:2021**

The future of invested membership lies with the DeMolay. These young men have been groomed and exhibit the high moral standards

and teachings which Masonry is founded upon.

6. The Membership Committee Chairman shall follow up on any/all Scholarship winners and their families for potential Masonic membership. **Goal: 2021**

The Valley awards thousands of dollars every year to young men whom exhibit the virtues befitting a Mason. We should be creating Ask1toBe1 packets or something similar for each applicant.

7. The Membership and Military Recognition Chairmen should work together to plan events to reach out to incoming/outgoing Military families in the Bremerton area. **Goal: 2023**

The purpose of these events would be to show a fraternal greeting and support network outside of their Military service. Ask1toBe1, scholarship applications, DeMolay, Jobs' Daughters, Rainbow Girls, OES...each of these bodies should involve themselves in supporting our Military service men & women become a part of our families during and after their service to our country.

MEMBERSHIP (Retention)

1. Hold appreciation event for Reunion workers. **Goal: 2021**

Each year the four bodies will sponsor an annual appreciation event to thank the many volunteers that help make the Scottish Rite Organization function. The list would not be limited to the following, but is to be used as an example: Reunion Committees, Docents, Office volunteers, and others who donate their time to the Scottish Rite Bodies. The Venerable Master of Kadosh will be charged with the production of the event.

2. Continue local Knights of St. Andrew organization. **Goal: 2021**

The subordinate organization specifically tailored to 32° and new members will continue to be encouraged to take part in Scottish Rite activities. Initiate and continue active involvement of these valuable members.

3. Create Scottish Rite Masonic education/discussion group. **Goal: 2022**

With programs such as the Master Craftsman course that is now completely virtual, we need to refocus on how our Valley can create a monthly program that takes in-depth looks into our degrees. Degree Captains would be strongly encouraged to provide monthly presentations/workshops for all brethren to attend and hone their philosophical understanding of the degree.

4. Set up entertainment/educational group outings. **Goal: 2022**

The four presiding officers in conjunction with Chairman will appoint a Social Director to coordinate such outings. This will provide an opportunity for members and their families to participate in group activities with other Scottish Rite Masons, including trips to other Scottish Rite Valleys, theatre performances, sporting events, etc.

III. COMMUNITY RELATIONS

1. Appoint local Chamber of Commerce Committee Chairman for the Valley. **Goal: 2021**

Advertise to public organizations about programs that are available as programs, not to be limited to Freemasonry or the Scottish Rite. Let them know who we are and what we do including some of our charitable endeavors.

2. Appoint Masonic Community Outreach Committee Chairman for the Valley. **Goal: 2021**

Promotional material and efforts should be made to increase awareness of the Valley and our mission. This should include but not be limited to Scholarships, Rite Care, Memorial Services, KSA Support, and Military Outreach.

3. Support public education by utilizing Americanism presentations with local community groups. **Goal: 2022**

The Americanism Committee Chairman should implement any and all presentations to be a part of any and all celebrations that is American in the community.

4. Support in local parades and community events. **Goal: 2022**

The committee Chairmen for Americanism, Chamber of Commerce, Events, KSA, Membership, Military Recognition, Membership, Public Relations, and the General Secretary should all plan and work towards successfully planning for parades in the area as a show of representation and stability in the community.

5. There are a number of the ways that we might be able to provide a significant community impact. **Goal 2022**

DeMolay is probably the source of the more of our future Freemasons. Because of the few DeMolay that are presently in the area they have had little impact on our membership. Support of DeMolay and the other youth groups whose parents could end up having an interest in Freemasonry needs to be emphasized. Do we provide any kind of potential membership info to the parents of the scholarship recipients? Action: establish a community relations responsibility. See Item 5 under membership.

There are more than 50 relevant 501(c)3 organizations in the area. We could select a few to team with versus trying to solve the problems by ourselves. It's up to us to pick some and try and establish a team approach with these other organizations that are trying to solve the same or similar problems. Homeless children are another community to support in addition to firemen, policeman, and health organizations associated with the Covid 19 virus.

Action: Gen Sec: designate an Outreach Chairman.

6. Arrange for High Visibility Guest speakers that we may join with in support of community actions. Action: Gen Sec/Committee Chairs.
Goal 2021

IV. Fundraising

1. Silent auction fundraisers. **Goal: 2022**

Each of the four presiding officers will determine, in conjunction with the General Secretary, Personal Representative, and the Public Relations Chairmen, quarterly silent auctions sponsored by each of

the bodies. It would be the responsibility of each presiding body officer to coordinate items for auction, timing of said auction, and to work with Public Relations for promotion. Committee chairmen should be involved to help put boots on the ground asking for charitable donations (investigate to see if as we catalogue what is given to us by whom, provide them with a tax credit based upon what the item sells for...have to check legality of that thought) or donations provided by members of the Valley and corresponding Blue Lodges. Have an old classic car just rusting away...donate it and help the Valley, and a tax credit for yourself! Have some farrier's tools no longer being used, donate them!

2. KSA support to local events for donations. **Goal: 2022**

The KSA by definition is a service/support body within the Valley. Outreach to the local community for support with a simple request of a donation (develop "recommendations" based on service provided). The KSA would select monthly what services they would perform and present a readout on the work provided the following month. Money may not flow in at first, but the community involvement would be invaluable for future generations of Knights!

3. Event rental space with staffing by KSA. **Goal 2022/2023**

The Valley should investigate multiple levels of renting our Temple and offer packages including but not limited to KSA staffed, Charity dinners, provide venue for art shows/silent auction, etc.

4. It is proposed that we set a goal of having an investment portfolio value of \$2,000,000 in 10 years. **Goal 2024 (for established plan)**

Action: In addition to a yearly financial audit, the Financial Committee should develop and publish an approved Bylaw change to assure the fiscal health of Valley investments; such as quarterly reviews with our portfolio managers. Such policy requirements will be added to the long-range plan.

Addendum A: Yearly DAR Responsibilities List

Who	Event	DAR Requirement	Event Due Date
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Almoner	Submit Almoner funds to Secretary	Dispense charity to relieve the needy at his discretion and without publicity. He takes charge of moneys collected, turns them over to the Secretary, and dispenses funds as needed with the consent of the General Secretary.	Monthly
Almoner	Issue Almoners list of recipients - Name, address, amount, check no, date;	Almoner Required by IRS 990	Dec 31st or First Quarter after tax year Dec 31st or First Quarter after tax year
COMMANDER, COUNCIL OF KADOSH	Chair Monthly Executive Committee meetings	Serve as chairman of the Valley Executive Committee Coordinate the meeting agenda with the Personal Representative, General Secretary and Treasurer.	months April, May and June.
COMMANDER, COUNCIL OF KADOSH	Rehearse Kadosh degrees	<u>The Degrees of the Council are ultimately your responsibility.</u> Coordinate selection of a degree captain with the DOW and schedule adequate rehearsals.	As required
COMMANDER, COUNCIL OF KADOSH	Host Past Presiding Officers & Old Timers Night Dinner	The Council of Kadosh is responsible for hosting the Past Presiding Officers & Old Timers Night with assistance of the Lodge of Perfection.	Issue Schedule
Director for Education and Americanism Committee	Provide ROTC awards	Americanism Chair	As directed
Director for Education and Americanism Committee	Chair and report	The Education and Americanism Program Director will be responsible for activities that promote the understanding of, and interest in, the American Form of government. The committee is responsible for the presentation of the AASR Education and Americanism Award certificate and medal to JROTC recipient of each high school, that has a JROTC unit in the Bremerton Valley of the Scottish Rite coverage area. The Program Director shall provide a written report of the Award Recipients to the Chairman of the Leadership Committee for incorporation in that committee's annual report to the General Secretary.	Annual report
Director for the Valley Scholarship Program	Chair and report	The Program Director is responsible for the scholarship program in the Bremerton Valley of the Scottish Rite. He will coordinate the efforts of the Orient Scholarship committee to obtain scholarship candidates, evaluate those	Annual Awards Banquet and Annual report

		<p>candidates. He shall recommend candidates for scholarships, and communicate the needed information to both the candidates and recipients. He will be responsible for coordinating and conducting the annual Scholarship Awards Night Banquet and ceremony of the Bremerton Valley of the Scottish Rite.</p>	
DIRECTOR OF THE WORK AND THE PROPERTIES DIRECTOR	Annual properties inventory	Perform an annual inventory of properties and a written report be made to the Bremerton Valley Secretary	September 1st of each calendar year.
DIRECTOR OF THE WORK AND THE PROPERTIES DIRECTOR	Annual Properties Budget submittal	Submit an annual budget for purchase and maintenance of properties to the General Secretary.	October 1 of each year
DIRECTOR OF THE WORK AND THE PROPERTIES DIRECTOR	Assign Degree Captains	The Director of the Work shall be responsible for the selection of the Degree Captains.	First Quarter each year
Director for the Valley Scholarship Program	Issue list of Scholarship recipients, Sept each year	Chairman Scholarship Committee: Required by IRS 990	Sept each year
Finance Committee Chairman	Chair and report	<ol style="list-style-type: none"> 1. The Finance Committee will review the work of the Treasurer and General Secretary and will provide advice and assistance on any and all financial activities of the Valley. The Treasurer will serve as the Chairman of the Finance Committee. 2. The Finance Committee will meet quarterly to review the Valley investments and assist in determining any required changes. 	Quarterly Budget Status Reports
General Secretary	Record Minutes	<ol style="list-style-type: none"> 1. Records minutes and decisions of all meetings and conducts correspondence at the pleasure of the presiding officer. 	Monthly
General Secretary	Report Warrants Issued	<ol style="list-style-type: none"> 2. Collects and records all funds and disbursements requiring same to be audited 	Monthly
General Secretary	Issue Annual Budget	<ol style="list-style-type: none"> 3. With the assistance of the Treasurer and Finance Committee, develops annual budget for Valley 	October each Year
General	Issue Yearly	<ol style="list-style-type: none"> 4. Assists in development of the yearly 	First Quarter

Secretary	Degree Schedule	degree schedule	Each year and updated regularly
General Secretary	Administer Sentinel input and reports	5. Administrator for Sentinel	As required
General Secretary	Issue Membership Status to Supreme	6. Tracks membership changes and dues collection	4th Quarter
General Secretary	Issue Fiduciary Report	7. With the assistance of the Treasurer, reports of Valley financial condition	First Quarter
General Secretary	Assure Leadership Committee meets and attend meetings	8. Oversight of Leadership Committee duties and tasking's:	Quarterly
General Secretary	Manage Leadership Committee	9. Assigns the Leadership Chairman to review Valley "policies and procedures" as he deems necessary.	As required
General Secretary	Manage Leadership Committee	10. Tasks Leadership Committee Chairman with creating committees that may be germane to Valley operations	As required
General Secretary	Provide News Letter Input	Provide input to Newsletter Editor.	Quarterly or more often
General Secretary	Provide Schedules and Officers Lists.	Responsible for Schedule and Officer List input.	After installation and as required
General Secretary	Issue Fiduciary report, Secretary, Due date first Quarter, Required by SGIG	Secretary: Required by SGIG	First Qtr.
General Secretary	Issue Sales inventory, Due Date Dec 31st or First Quarter after tax year	Secretary: Required by IRS 990	First Qtr.
General Secretary	Issue list of Officers that have funds approval responsibilities	Secretary: Required by IRS 990	Dec 31
General Secretary	Issue copy of submitted 990 and copy of	Secretary, Section 42 (2012) Secretary's Manual.	yearly

General Secretary	yearly audits to Supreme, Issue 25, 50-year certificates.	Secretary, Secretary's manual	As required
Leadership Committee Chairman	Chair and report	Responsible to the General Secretary and shall assist him in his administrative burdens and act as his advisory panel on the implementation of policies and procedures which clearly define the role of committees and the programs of the Bremerton Valley of the Scottish Rite. They shall make an annual review of all programs and committee reports. Their key product will include yearly policy and budget recommendations to the General Secretary and the Personal Representative of the SGIG in all areas that concerns the efficiency and image of the Bremerton Valley of the Scottish Rite and its footprint in the community. The Chairman shall prepare a written report of the Status of Committees and Policies of the Valley to the General Secretary by December 1st of each calendar year to support budget planning cycle.	Quarterly meetings or more often as recommended by Gen Sec. Report Dec 1 each year
Life Membership Committee Chairman	Chair and report	Promotes the Scottish Rite Life Membership program. Reports annually to the Chairman of the Leadership Committee on the income from the life membership fund to be incorporated into that committee's annual report and budgeting recommendations to the General Secretary by Dec. 1	Annual Report
Long Range Planning Committee Chairman	Chair and report	Produce plans and programs for the future direction of the Bremerton Valley in the three-to-5-year time range that will promote the long-term health and growth of the Scottish Rite. This committee is a sub-committee under the VMAP program and shall meet at least once a year but more often if necessary. They shall submit a set of minutes of that meeting, and proposed budget recommendations, no later than 15 November of each year to the Chairman of The Leadership Committee for incorporation into that committee's annual report to the General Secretary.	Report 15 Nov each year
MASTER OF	Chair Monthly	Serve as chairman of the Valley Executive	months July,

<p>KADOSH OF THE CONSISTORY MASTER OF KADOSH OF THE CONSISTORY MASTER OF KADOSH OF THE CONSISTORY</p>	<p>Executive Committee meetings Rehearse Consistory degrees Host All Masonic Night Dinner</p>	<p>Committee. Coordinate the meeting agenda with the Personal Representative, General Secretary and Treasurer. <u>The degrees of the Consistory are your responsibility.</u> Coordinate selection of a degree captain with the DOW and schedule adequate rehearsals. The Consistory is responsible for planning and hosting the All-Masonic Night with assistance of the Lodge of Perfection and is responsible for planning and hosting an Honor man’s Banquet in the fall.</p>	<p>August and September. 1 or more months before Reunions Fall of each year</p>
<p>Membership Committee Chairman</p>	<p>Chair and report</p>	<p>Develops plans and programs for increasing the total membership of the Bremerton Valley of the Scottish Rite and that aid in the recruitment of new members, the retention of existing members, and the reintroduction of inactive members to active participation in the work of the Rite. They shall meet at least twice a year at a time designated before the Spring and Fall Reunions and submit a report of that meeting to the Chairman of the Leadership Committee for the purposes of incorporation into that committees annual report to the General Secretary.</p>	<p>Annual Report</p>
<p>Mentoring Committee Chairman</p>	<p>Chair and report</p>	<p>Develops and executes the Valley Mentorship program intended to ensure that each new member of the Valley is assigned a trained mentor who will guide the member through his first year in the Valley. This committee will coordinate with the Education Committee and the Class Marshals to ensure candidates receive proper instruction during Reunions They shall meet at least twice a year at a time designated before the Spring and Fall Reunions and submit a report of that meeting to the Chairman of the Leadership Committee for the purposes of incorporation into that committee’s annual report to the General Secretary.</p>	<p>Annual Report</p>
<p>Newsletter Editor</p>	<p>Issue Newsletter</p>	<p>The Editor of the Valley Newsletter creates the monthly publication (preferred) of the Valley. He obtains information and articles as appropriate, composes and arranges the monthly document. He then sends the copy to the General Secretary for approval prior to submitting it to the publisher for printing</p>	<p>Quarterly or more often</p>

		and circulation or if an online version, to the webmaster. The Editor will also prepare an electronic version of the Communicator for posting on the Web Site and electronic transmission to individual members. The General Secretary is responsible for providing the mailing list of members to the publisher.	
Personal Representative of SGIG	Appoint Committee Chairmen with input from officers	the PR appoints committeemen as needed or causes this to be done. (In Conjunction with Director of the Work for Degrees)	1st quarter
Personal Representative of SGIG	Issue Appointments list	(partial list – see DAR) 1. Appoints officers, directors and committeemen as needed or cause this to be done.	1st quarter
Personal Representative of SGIG	Issue degree schedule with Dow & Gen Sec. Oversees all Executive Committee	2. Oversees development of the degree schedule oversees all Executive Committee Meetings to offer guidance and direction	Degree Schedule 1st qtr.
Personal Representative of SGIG	State of the Rite report	3. Causes production of the State of the Rite report of the Bremerton Valley of the Scottish Rite to the SGIG	2nd quarter
Personal Representative of SGIG	Oversight of Committees and Directors	4. Provides General oversight of Committees and Directors	As required
Personal Representative of SGIG	Provides Guidance	5. Provides guidance and input to the General Secretary regarding staffing and financial reporting	As required
Personal Representative of SGIG	Provide decisions and assure they are recorded	6. Issues, including the Valley budget Is the ultimate authority, in consultation with General Secretary, for issues relating to the fraternal functions of the Valley, such decisions shall become a matter of record for posterity.	As required
Presiding Officer KNIGHTS OF ST. ANDREW:	Provide List of Visitors	Provide assistance as requested by the Personal Representative of the SGIG and/or the officers. And provide the hosting Presiding Officer with a list of visitors.	Each Stated Meeting
PRESIDING OFFICERS	Monthly Lodge Council Meeting	Perform all the monthly meetings required by Supreme Statute Governing Subordinate Bodies Article XV, Section 9. And Bylaws (rev 2005) of the Valley per Article VI The chairmanship is as follows: 1st Quarter..... Chapter of Rose	Monthly

		Croix 2nd Quarter.....Council of Kadosh 3rd Quarter..... Consistory 4th Quarter..... Lodge of Perfection	
PRESIDING OFFICERS	Train: Officers Duties Assignments and Responsibilities	Train both your first and second officers such that they can move up if you are absent.	As required
PRESIDING OFFICERS	Set up Lodge	Setting up the Lodge for your meeting nights.	Monthly
PRESIDING OFFICERS	Plan Dinners	Arrange for the dinners for which you are responsible.	See Officer Sections below
PRESIDING OFFICERS	Stated Program Enrichment	Plan a program for your meeting. It can be entertainment, Masonic education or civic education.	Monthly
PRESIDING OFFICERS	Ritual Training	Learn and practice with your officers: The ceremonies of the degrees; The opening and closing of your Lodge; The proper procedure for conducting both a candidate ballot and an election.	Quarterly
PRESIDING OFFICERS	Assign Orator and provide short presentations	Assure that the Orator, or the equivalent officer, is qualified to give short presentations	Monthly
PRESIDING OFFICERS	Proposed Officers List	Assure that every elected and appointed position of their respective Valley Body is filled and that they, or a pro-tem representative, attend their respective meetings.	Issue list of proposed officers Oct of each year.
PRESIDING OFFICERS	Provide additional non-stated "fun" meetings	Plan and execute one additional meeting/activity per year. This may be any type of activity including only brethren, families, the Masonic community, and/or the general public.	Quarterly
PRESIDING OFFICERS	Train officers in Supreme and DAR Requirement	The Presiding Officers shall insure that the other elected and appointed officers of his particular Valley Body are performing their duties as set forth in the DAR.	As required
PRESIDING OFFICERS	Train officers in Supreme and DAR requirements	The Presiding Officers shall insure that the other elected and appointed officers of his particular Valley Body are performing their duties as set forth in the DAR.	As required
Public Relations Committee Chairman	Chair and report	Assists the Newsletter editor and develops and implements activities designed to make the general public aware of the activities of the Bremerton Valley of the Scottish Rite and to develop a favorable impression of the Bremerton Valley communities which are on the	Annual Report

		<p>Kitsap and Olympic Peninsula's.</p> <p>They shall meet at least twice a year at a time designated before the Spring and Fall Reunions and submit a report of that meeting to the Chairman of the Leadership Committee for the purposes of incorporation into that committee's annual report to the General Secretary.</p>	
Research and Education Committee Chairman	Chair and report	<p>Develops programs to further the study of Masonic Education within and outside of Scottish Rite. and provides the Class Marshals in coordination with the Mentoring Committee. Class Marshals will be responsible for contacting class mentors about upcoming degrees, escorting candidates between degrees, and communicating degrees that are not presented in full form. The Education Committee will also provide educational material that explains the various degrees presented by the Valley. They will also coordinate with the Orators of each lodge to provide educational presentations at each Bremerton Valley of the Scottish Rite meeting.</p> <p>They shall meet at least twice a year at a time designated before the Spring and Fall Reunions and submit a report of that meeting to the Chairman of the Leadership Committee for the purposes of incorporation into that committee's annual report to the General Secretary.</p>	Annual Report
Treasurer	Pay bills and report	1. Receives all moneys from the Secretary, makes due entry thereof, and pays them out by order of the Body.	Monthly Report
Treasurer	Review Budget and Report	2. in conjunction with the General Secretary, be responsible for the funds of the Bremerton Valley of the Scottish Rite.	Monthly Report
Treasurer	Chair Financial Committee Meetings	3. Assist in decisions on how and where Valley assets will be placed, transferred and spent.	Monthly
Treasurer	Assist Secretary prepare yearly budget	4. Assist the General Secretary in preparation of the annual budget. He will ensure that the annual audit is performed and will review the results.	October each year
Treasurer	Assist Secretary prepare financial reports	5. Assist the General Secretary in preparation of financial reports that will be made available to the general membership.	As required
Treasurer	Develop yearly	6. Along with the Secretary, Develops	October each

	budget input for Secretary	annual budget for Valley	year
Treasurer	Coordinate Investment Strategy with Broker and Finance Comty	7. Oversight of investments and bank accounts in cooperation with Finance Committee	Quarterly
Treasurer	Keep Bill records and report	8. Pays all bills	Monthly
Treasurer	Submit IRS 990	9. Responsible for IRS submissions and audits	May each year
Treasurer	Monthly Finance Report	10. Reports of Valley financial condition	Each Stated Meeting
Treasurer	Issue list of other charity recipients: Rite care, youth groups, etc.,	Treasurer: Required by IRS 990	Dec 31
Treasurer	Issue IRS 990 to IRS	DAR Section H Treasurer	May each year
Treasurer	Yearly Financial Audit	DAR Section H Treasurer- See Appendix 3 BVSr Yearly Financial Audit Plan	After issue of 990 to IRS
VENERABLE MASTER, LODGE OF PERFECTION	Chair Monthly Executive Committee	Serve as chairman of the Lodge Council Executive Committee of the Valley. Coordinate the meeting agenda with the Personal Representative, General Secretary and Treasurer.	months of October, November and December of each calendar year.
VENERABLE MASTER, LODGE OF PERFECTION	Rehearse LOP degrees	<u>The Degrees of the Lodge of Perfection are ultimately your responsibility.</u> Coordinate selection of a degree captain with the DOW and schedule adequate rehearsals.	1 month before Reunion degree scheduled.
VENERABLE MASTER, LODGE OF PERFECTION	Host Feast of Tishri	The Feast of Tishri and prepare and submit an event plan for this special meeting to the General Secretary and the Personal Representative for their approval in September.	3rd Quarter
VMAP Committees	Chair and report VMAP and Master Craftsman responsibilities Not listed in DAR	VMAP and Other Committee Responsibilities	As Directed by VMAP
Web Master	Update Website Schedules and Officers List based on input from Gen Sec.	Responsible to maintain the Bremerton Valley of the Scottish Rite website in an up-to-date and visually appealing fashion. He will make changes to ensure that the site contains the most current data at all times. He will need to work	After installation and as required

with all groups and committees to obtain and publish information on the site. He will also maintain appropriate links to and from other Masonic Sites.

WISE MASTER OF THE CHAPTER OF ROSE CROIX

Chair Monthly Executive Committee meetings

Serve as chairman of the Valley Executive Committee. Coordinate the meeting agenda with the Personal Representative, General Secretary and Treasurer.

months
January, February and March.

WISE MASTER OF THE CHAPTER OF ROSE CROIX

Rehearse RC degrees

The degrees of the chapter of Rose Croix are your responsibility. Coordinate selection of a degree captain with the DOW and schedule adequate rehearsals.

As required

WISE MASTER OF THE CHAPTER OF ROSE CROIX

Host Remembrance and Renewal Dinner

Host the dinner and Ceremony of Remembrance and Renewal. And provide Seder Plate per guidance in "Forms & Traditions of the Scottish Rite" (Klienknecht)

2nd Quarter

Lance N. Otis

Long Range Planning Chair: _____ 2/15/2021__

Illustrious Brother, Lance Otis 33rd Degree IGH *Note: the long range \$2 mil portfolio target was specifically added at my request.

Contributing LRP Member: _____ 2/16/2021__

Brother Jason Reeder 32nd Degree

Personal Representative to the SGIG: _____

Illustrious Brother, Mike Pursey 33rd Degree IGH

General Secretary: _____

Brother Scot Sageser 32nd Degree KCCH