



LEVEL 3: UNIT RESOURCES

Shape > Review and Plan > Creating a Development Plan

This document, “Creating a Development Plan”, describes how to bring together members of your Lodge or Chapter to plan how you will develop over the next few years. The plan will ensure that the outcomes of your review are turned into positive actions over an agreed period of time.

1. Create a forum for discussion about the future of the Lodge or Chapter that is open to all members and not just the members of the Committee or the Past Masters / First Principals. This could be by inviting all members to planning meetings or by opening out some committee meetings to all members.
2. Start by reviewing the Lodge or Chapter as it is now. See “**Reviewing your unit**” [see guidance material] for a series of questions covering all aspects of the Lodge / Chapter life and practices. Include a SWOT analysis examining the Lodge / Chapter’s Strengths, Weaknesses, Opportunities and Threats.
3. Involve all members in the review and discussions.
4. Ask every member
 - a. What they like about the Lodge or Chapter and what they wish to see continue?
 - b. What they don’t like about the Lodge or Chapter and what they wish to stop?
 - c. What they would like to see introduced?

Think of these in turn as Green, Red and Amber actions.

5. Compile together your:
 - (1) Unit Outline (which is an honest self-assessment of the Lodge or Chapter’s current situation),
 - (2) your SWOT analysis and
 - (3) your assessment of Red, Amber and Green actions (known as a RAG assessment).
6. Discuss these in open forum, seek consensus where possible and reach some conclusions. This review will make it much easier to agree a development plan and an agenda for change.
7. Agree a shared vision of what you would all like the Lodge or Chapter to be like in three to five- or seven-years’ time. This might include the atmosphere in the Lodge / Chapter, special interests, distinctive practices in the temple and at the festive board, how it operates, the source of future members, membership numbers, etc.
8. Agree a plan of actions and steps that, over a period of time, will gradually change the Lodge or Chapter to be closer to your vision and which address your agenda for change.
9. Document, in the plan of actions, “who is going to do what and by when”. Include any resources that will be needed to carry out the plan, including skills, time and money.
10. **Plan for the succession** of both progressive and non-progressive / continuing officers over the same period.
11. Meet regularly, as a discussion forum, to review the plan and its progress, to check that the changes are making a difference and to make sure that all members are kept informed and engaged.
12. Update the Lodge / Chapter Outline so that it always remains a current snapshot of the Unit.



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13. Celebrate your successes as they occur. Celebrate in a manner that is meaningful, enjoyable and worthwhile for the members, providing an opportunity for those who may have been sceptical of the process to engage.
14. Inform others outside the Unit about your achievements and progress.
15. Keep a record of the changes and successes, to remind you of the “distance you have travelled” and to form a valuable part of the Unit’s history.
16. Update your plan at regular intervals and before the activities it details are finished.

SWOT ANALYSIS

SWOT analysis	
<i>Strengths</i>	<i>Weaknesses</i>
<i>Opportunities</i>	<i>Threats</i>



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RAG ASSESSMENT

RAG assessment	
Red <i>(things we want to stop doing)</i>	
Amber <i>(things we want to start doing)</i>	
Green <i>(things we want to continue doing)</i>	

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UNIT DEVELOPMENT PLAN

*Our vision for our Lodge / Chapter by 20** is to be ...*

[illegible]