



SCOTTISH RITE

Northern Masonic Jurisdiction

Valley of Excellence Award Requirements

Introduction

To the Brethren of Scottish Rite, NMJ:

The Valley of Excellence award is to recognize Valleys in the Scottish Rite, Northern Masonic Jurisdiction who go above and beyond in their endeavors. With focuses on areas of membership, service/philanthropy, leadership development, and operations, this program encourages Valleys to deliver a premier Scottish Rite experience. We want to highlight the best of the best with this award!

To compete for the Valley of Excellence award, Valleys will accomplish as much as possible from the scoring outline within the census year. The official date range of qualifying for this award every year is June 16 to June 15 of the following year.

This document will overview the scoring method used to compete for the Valley of Excellence award. This outline was built on a scaling method which will scale automatically with the size of your Valley. Please note, it is not possible to receive “extra credit or points” for any category.

To become a “Valley of Excellence” a score of 90% will need to be obtained. If a Valley reaches the pinnacle success point of 90%, they will be allotted an additional 33° nomination as a special incentive.

I would like to take a moment to especially thank the Supreme Council State of the Rite / Strategic Planning Committee, chaired by Ill. Jeffry A. Simonton, 33°, for their diligent work in putting together this incredible program. Their tireless efforts will help give all Valleys a workbook to our collective fraternal success.

Thank you for your continued work for your Scottish Rite, NMJ.

Fraternally and Sincerely,

David A. Glattly, 33°
Sovereign Grand Commander
Scottish Rite, NMJ



Scoring Outline

The Valley of Excellence award is broken down into four key areas that add up to 100% overall. These four key areas are broken down into subcategories with their own percentages that make up the key area's total percentage. Below is an outline of the scoring card for the Valley of Excellence. After the outline is a breakdown of each section to give information on each category and subcategory.

1. Membership (50%)

- Recruitment - 20%
- Engagement - 20%
- Restoration & Preservation - 10%

2. Service and Philanthropy (25%)

- Service Events - 5%
- Widows Programs - 5%
- Almoners Fund - 5%
- Champion a Charity - 5%
- Blue Envelope - 5%

3. Leadership Development (15%)

- State Participation - 5%
- Membership Education - 5%
- Mentoring Program - 5%

4. Operations (10%)

- Finances - 2%
- 990/Annual Report - 2%
- Presiding Officers - 2%
- New Member Registration - 2%
- Communications - 2%

1. Membership – 50%

For the Membership category, there is partial credit for subcategories. Points will scale accordingly based on the amount achieved in that category.

Membership is the lifeblood of the Scottish Rite, Northern Masonic Jurisdiction. It is what drives our programs and experience in our Valleys. Therefore, it is evident that the Membership category makes up the largest percent of the Valley of Excellence award. This area is divided up into the three key areas of membership recruitment, membership engagement, and membership restoration and preservation.

1a. Recruitment – 20%

The Presiding Officers of the Valley and Membership Committee will work together to set a membership recruitment number goal for the year. The baseline for this goal will be the Valley's average new members recruited over the past 5 years. The Valley may not set their goal under this baseline. ***This baseline will be the goal if the Valley has no goal established.***

The goal will be reported to the Membership Team at Supreme Council, where it will be reviewed with the Valley. Once this goal is set, the Valley will achieve their goal to receive full points for recruitment.

To receive partial credit, the Valley will achieve at least half of this goal. The partial credit will be adjusted accordingly to the number recruited.

The deadline for Valleys to set their recruitment goal for the year is September 1. This cannot be changed after this date.

1b. Engagement – 20%

To earn credit for the Engagement subcategory, the Valley will need to do the following. Each section of this subcategory adds up to the overall 20%.

- **Host min. 2 Reunions – 4%**
- **Host min. 12 Family Life/Brotherhood events – 4%**
- **Host min. 4 “Rite on the Road” events (Initiations, lodge showcases, etc.) – 4%**
- **Host min. 2 New Member orientations – 4%**
- **Contact min. 20% of total membership for Brother to Brother program – 4%**

This is shown on the score card on the examples on pg. 9-11 as **20 events / 20% total membership for B2B contact**. This category will be reported by the Valley on the Annual Report concluding the Census Year.

1c. Restoration & Preservation – 10%

The Valley will restore ***at least 7% of their NPD suspended members from over the past 5 years***, and must finish the year with ***less than 5% losses (excluding Great Architect of the Universe losses)***.

2. Service and Philanthropy – 25%

For the Service and Philanthropy category, there is partial credit for subcategories. Points will scale accordingly based on the amount achieved in that category.

The service and philanthropy initiatives at the Scottish Rite, NMJ is how we change lives, together. This area is divided into subcategories of service hours, service events, and donations to charitable programs.

2a. Service Events – 5%

The Valley will organize, host, and implement **6 or more service events per year** and report on the Annual Report how many members present and total service hours completed for each event.

2b. Widows Programs – 5%

At least twice annually, communicate and/or host an event for widows and/or their families; share your stories with Supreme Council in your Annual Report.

2c. Almoners Fund – 5%

The Valley will annually donate at least \$2 per member to the Supreme Council Grand Almoner's Fund. This donation is Valley based and donated by the Valley on behalf of your members. This category will be calculated by Supreme Council at the conclusion of the Census Year.

2d. "Champion a Charity" – 5%

The Valley may select a charity of their choice to "champion" and support. They will annually donate **at least \$2 per member** to this charity. **The Scottish Rite, NMJ encourages this to be the Valley's local Children's Dyslexia Center if the Valley has one.** These donations are Valley based and donated by the Valley on behalf of your members. This category will be reported by the Valley on the Annual Report concluding the Census Year.

2e. Blue Envelope – 5%

To accomplish credit for this subcategory, the Valley will have **at least 7.5%** or more total members donate to the Blue Envelope. This category will be calculated by Supreme Council at the conclusion of the Census Year.



3. Leadership Development – 15%

For the Leadership Development category, there is partial credit for subcategories. Points will scale accordingly based on the amount achieved in that category.

We must constantly develop the leadership skills of our members in order to maintain a successful Scottish Rite program. This area is divided into subcategories of state participation, membership education, and mentoring programs.

3a. State Participation – 5%

The Valley will have a **minimum of 4 members** participate in a Council of Deliberation or other state meeting.

3b. Membership Education – 5%

The Valley will have **at least 5% of their membership** attend a local, regional, or NMJ sponsored membership seminar per year.

3c. Mentoring Program – 5%

The Valley will host **one mentoring program** within the year. Examples of a mentoring program include new member orientation, new presiding officer's workshop, etc.

4. Operations – 10%

For the Operations category, there is NO partial credit for subcategories. You need to fulfill what is required to receive points for that subcategory.

It is vital that our Valleys are completing all required administrative tasks and operations in order to effectively run.

4a. Finances – 2%

The Valley will annually complete their per capita, budget, and insurance **on time. No late payments unless otherwise approved by the Sovereign Grand Commander.** This category will be calculated by Supreme Council at the conclusion of the Census Year.

4b. 990/Annual Report – 2%

The Valley will annually complete and submit their 990 and annual report. This category will be calculated by Supreme Council at the conclusion of the Census Year.

4c. Presiding Officers – 2%

The Valley will annually submit their presiding officer information using the online form. This includes officers who are serving multiple years/terms. This category will be calculated by Supreme Council at the conclusion of the Census Year.

4d. New Member Registration – 2%

The Valley should on average register 4° (Lodge of Perfection) new members **within 10 days.** This category will be calculated by Supreme Council at the conclusion of the Census Year.

4e. Communications – 2%

The Valley will send **at least 20 communications** to their members every year. Social media accounts count as one specific unit of communication. For instance, having a Facebook page is one unit of communication for the year, having a Twitter account is one unit of communication for the year, etc. This category will be reported by the Valley on the Annual Report concluding the Census Year.

Key Result Areas

(Valley Size = 3000 members)

| KRA | Result | Goal | Points | Out Of |
|-----------------------------------|------------|----------------|-------------|------------|
| Initiates | 215 | 200 | 20 | 20 |
| Engagement | 20,300 | 20,600 | 16 | 20 |
| Restoration | 12 | 14 | 8.6 | 10 |
| MEMBERSHIP | | | 44.6 | 50 |
| Service Events | 6 | 6 | 5 | 5 |
| Widows Programs | 2 | 2 | 5 | 5 |
| Almoner's Fund | \$6,000.00 | \$6,000 | 4 | 5 |
| Champion a Charity | \$4,200.00 | \$6,000 | 2.8 | 5 |
| Blue Envelope | 225 | 225 donated | 4 | 5 |
| SERVICE&PHIL | | | 20.8 | 25 |
| State Participation | 1 | 1 | 5 | 5 |
| Member Education | 0 | 1 | 0 | 5 |
| Mentor Program | 1 | 1 | 5 | 5 |
| LEADERSHIP DEV. | | | 10 | 15 |
| Finances | Y | Y | 2 | 2 |
| 990/Annual Report | Y | Y | 2 | 2 |
| Presiding Officers | N | Y | 0 | 2 |
| New Member Registration Time Avg. | 10 days | 10 days | 2 | 2 |
| Member Communications | 20 | 20 | 2 | 2 |
| OPERATIONS | | | 8 | 10 |
| TOTAL | | | 83.4 | 100 |

Key Result Areas

(Valley Size = 840 members)

| KRA | Result | Goal | Points | Out Of |
|-----------------------------------|------------|------------|--------------|------------|
| Initiates | 28 | 50 | 11.2 | 20 |
| Engagement | 20, 100 | 20, 168 | 16 | 20 |
| Restoration | 12 | 10 | 10 | 10 |
| MEMBERSHIP | | | 37.2 | 50 |
| Service Events | 6 | 6 | 5 | 5 |
| Widows Programs | 2 | 2 | 5 | 5 |
| Almoner's Fund | \$1,680.00 | \$1,680 | 5 | 5 |
| Champion a Charity | \$1,680.00 | \$1,680 | 5 | 5 |
| Blue Envelope | 60 | 63 donated | 3.81 | 5 |
| SERVICE&PHIL | | | 23.81 | 25 |
| State Participation | 1 | 1 | 5 | 5 |
| Member Education | 1 | 1 | 5 | 5 |
| Mentor Program | 1 | 1 | 5 | 5 |
| LEADERSHIP DEV. | | | 15 | 15 |
| Finances | Y | Y | 2 | 2 |
| 990/Annual Report | Y | Y | 2 | 2 |
| Presiding Officers | Y | Y | 2 | 2 |
| New Member Registration Time Avg. | 8.4 days | 10 days | 2 | 2 |
| Member Communications | 17 | 20 | 0 | 2 |
| OPERATIONS | | | 8 | 10 |
| TOTAL | | | 84.01 | 100 |

Key Result Areas

(Valley Size = 350 members)

| KRA | Result | Goal | Points | Out Of |
|-----------------------------------|-----------|------------|--------------|------------|
| Initiates | 9 | 20 | 0 | 20 |
| Engagement | 14, 55 | 20, 70 | 12 | 20 |
| Restoration | 12 | 14 | 8.6 | 10 |
| MEMBERSHIP | | | 20.6 | 50 |
| Service Events | 6 | 6 | 5 | 5 |
| Widows Programs | 1 | 2 | 2.5 | 5 |
| Almoner's Fund | \$437.00 | \$700 | 2.5 | 5 |
| Champion a Charity | \$283.00 | \$700 | 1.62 | 5 |
| Blue Envelope | 27 | 26 donated | 4 | 5 |
| SERVICE&PHIL | | | 15.62 | 25 |
| State Participation | 1 | 1 | 5 | 5 |
| Member Education | 1 | 1 | 5 | 5 |
| Mentor Program | 0 | 1 | 0 | 5 |
| LEADERSHIP DEV. | | | 10 | 15 |
| Finances | Y | Y | 2 | 2 |
| 990/Annual Report | Y | Y | 2 | 2 |
| Presiding Officers | Y | Y | 2 | 2 |
| New Member Registration Time Avg. | 11.2 days | 10 days | 0 | 2 |
| Member Communications | 24 | 20 | 2 | 2 |
| OPERATIONS | | | 8 | 10 |
| TOTAL | | | 54.22 | 100 |