



# SCOTTISH RITE

Northern Masonic Jurisdiction

## Valley of Excellence Award Requirements 2022-2023

# 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,

Peter J. Samiec, 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. On the next page 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.

*(See score outline on next page.)*

### 1. Membership (50%)

- Recruitment & Restoration - 30%
- Engagement - 20%
- Preservation - **qualifier**

### 2. Service and Philanthropy (25%)

- Service Events - 5%
- Sweethearts Programs - 5%
- Almoner's Fund - 5%
- Champion a Charity - 5%
- Blue Envelope - 5%

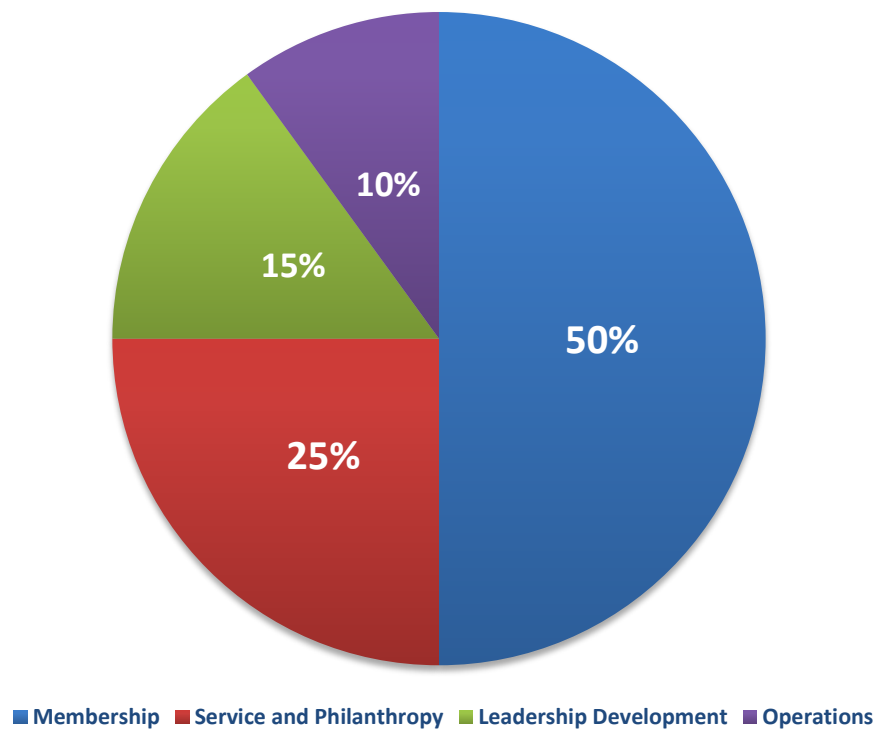
### 3. Leadership Development (15%)

- 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%

**\*\*\* Bonus 5 points( 70% of LOP good e-mails)**



## **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 experiences 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 two key areas of membership recruitment & restoration and membership engagement.

### **1a. Recruitment and Restoration– 30%**

The goal for this category has been established by the Strategic Planning Committee and is set at 4% of the total LOP membership as of 6/16 of the current census year. ***This data is pulled directly from the Supreme Council membership database. There will be absolutely no challenges to the data pulled. Data integrity must be maintained across the board for all Valleys.***

To achieve full credit for the this category, the Valley must achieve their full recruitment & restoration goal. To receive partial credit, the Valley will achieve at least half of this goal. The partial credit will be adjusted accordingly to the % of goal achieved.

In the efforts of striving to be a “Valley of Excellence”, there will be a preservation “**qualifier**” in order to receive any points in this category. Valley Suspensions for non payment of dues, cannot exceed 4% of their LOP membership as of 6/16 of the current census year.

## **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 – 3%**
- **Host min. 6 Family Life/Brotherhood events – 3%**
- **Host min. 4 “Rite on the Road” events (Initiations, lodge showcases, etc.) – 3%**
- **Host min. 2 New Member orientations – 3%**
- **Contact 100% of total membership for Brother to Brother program – 8%**  
*If no connection is made, the Valley will send a postcard*

The Brother to Brother program outline can be found in the Manual for Officers on Member Center. This category will be reported by the Valley on the Annual Report concluding the Census Year.

## **1c. Preservation – Qualifier**

\*\*\*\*\*In order to receive points in 1a, Suspensions for non-payment of dues must be ***less than, or equal to, 4% NPD.***

## **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 are how we change the lives of our members and make an impact on our communities, together. This area is divided into subcategories of service hours, service events, caring for our deceased Brothers’ Sweethearts and donations to charitable programs.

### **2a. Service Events – 5%**

The Valley will organize, host, and implement ***4 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. Sweethearts Programs – 5%**

***At least twice annually,*** communicate and/or host an event for sweethearts (significant others of deceased members) and/or their families; share your stories with Supreme Council.



## **2c. Grand Almoner's or Local *Almoner's Fund* – 5%**

The Valley will annually donate at least \$2 per member to the Supreme Council Grand Almoner's Fund or their own Almoner's/Hospitaller's Fund (if established). This donation is Valley based and donated by the Valley on behalf of its members. This category will be calculated by Valleys and the 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 ***the equivalent of \$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 its members. This category will be reported by the Valley on the Annual Report concluding the Census Year.

## **2e. *Blue Envelope* – 5%**

To receive 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. Credit will be applied to the member's Lodge of Perfection Valley. This campaign runs from October 1 to June 15.

## **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 run effectively and efficiently.

### **4a. Finances – 2%**

The Valley will submit their budget to Deputy for approval, make their Supreme Council Assessment payment by October 31<sup>st</sup>, and pay their 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 to the Office of Administration their IRS form 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 review and update their presiding officer information in Journey 365. 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 will register 4<sup>o</sup> (Lodge of Perfection) new members **within 10 days** of witnessing the 4<sup>th</sup> Degree. 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 units of 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.

*Examples:*

12 monthly letters = 12 units

4 newsletters = 4 units

### **Score cards & Updating VoE module**

A Valley can enter their progress and view their score card in J365.

All Supreme Council calculated fields will be updated the following day.

Blue Envelope appeal updates will be provided bi-weekly when received from the Charities Department.