

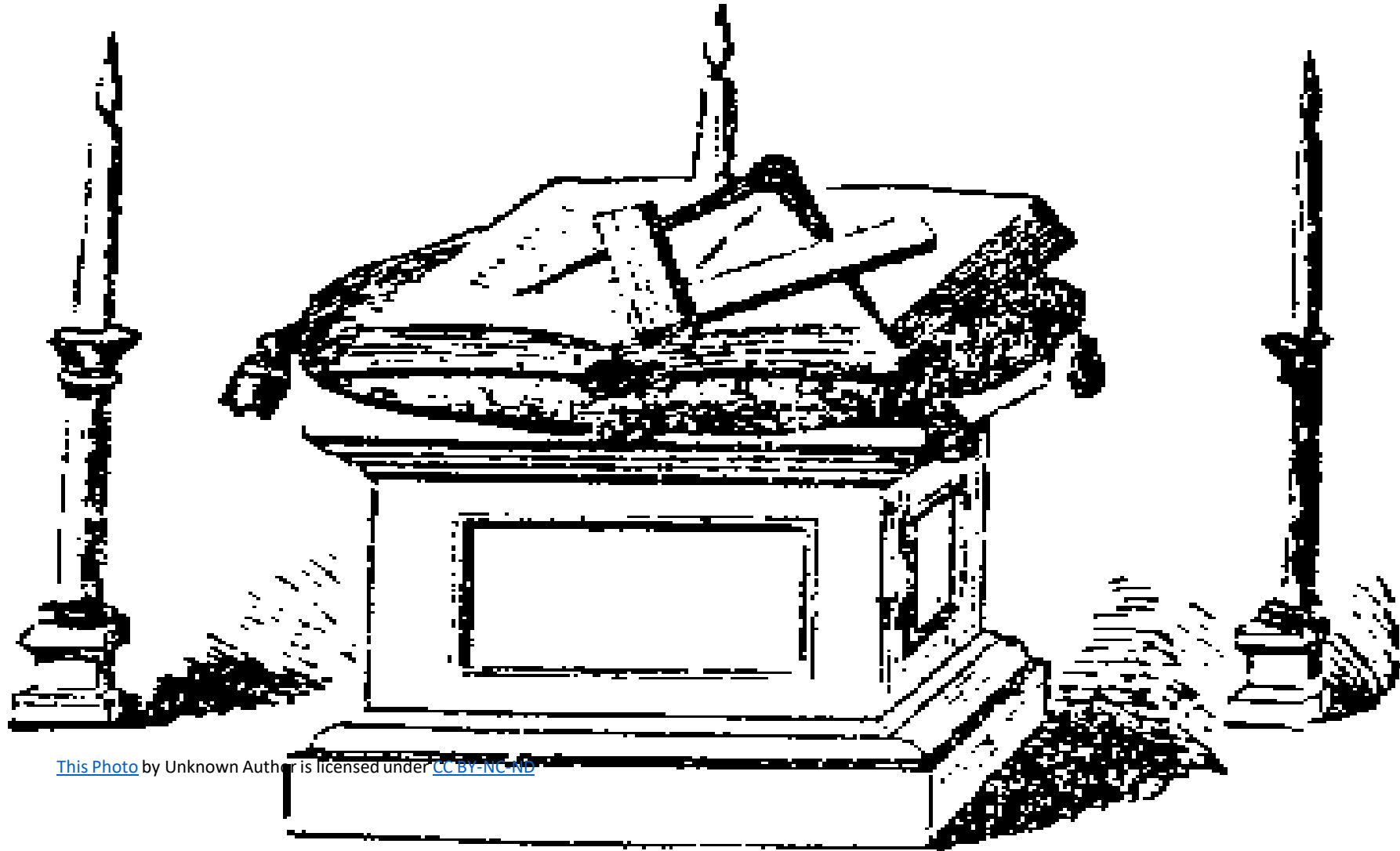
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The Right/Rite Heart

Summer Orient Advisory Retreat Otherwise known as SOAR

First, we pray



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Then we pledge,



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Scottish Rite Creed

*Human progress is our cause,
liberty of thought our supreme wish,
freedom of conscience our mission,
and the guarantee of equal rights
to all people everywhere
our ultimate goal.*

Mission Statement

It is the mission of the Scottish Rite of Freemasonry, Southern Jurisdiction, to improve its members and enhance the communities in which they live by teaching and emulating the principles of Brotherly Love, Tolerance, Charity, and Truth, while actively embracing high social, moral, and spiritual values, including fellowship, compassion, and dedication to God, family, and country.

Let's Go To Work!

- Appreciate the Valley of Franklin hosting us
- Welcome every Valley
- Continued commitment to the Masonic Family of North Carolina
- Initial report from “Letters from Home” Concert
- PRs: Celebration in each Valley since 2021 SOAR

Report from Deputy of North Carolina

(1 of 3)

- Membership: Retention, Recruitment, Renewal, 5240
- Changes in Leadership: Franklin, Raleigh, New Bern, Membership
- Orient Chairs now have access to Sentinel
- “Team Reach” introduced to help us calendar carefully
- Honors Expectations SPACE/262/318/11.1%
- Restoration: Journal change/NC one of top in Jurisdiction

Report from Deputy of North Carolina

(2 of 3)

- SGC “Town Hall” meetings: Let’s plan one!
- Forms and Ceremonies now in PDF
- Master Craftsman Online completely soon 2023
- Learning Management Software
- Scholarships: Kathryn Elizabeth Strickler and Wilkerson DeMolay
- Rite Care Conference in St. Louis September 28-30 ECU in!
- Fellows Program over 100 this year with 1100 + all time.
- Form 80: AVOID NPD AS MUCH AS POSSIBLE

Report from Deputy of North Carolina

(3 of 3)

- Per Capita increase is coming....more later
- 2021 Statutes of the Supreme Council
- Bylaw revision process
- Statements of support with Masonic Family: PHA/NMJ
- Back Lot construction anticipates a \$1 million revenue
- Plan NOW for Supreme Council August 2023
- PRs ONE Valley project planned before next SOAR
- Other...

The Masonic Home For Children at Oxford

Kevin Otis, Executive Director

- The “Family” is involved and we take the lead!
 - **Feb 11, 2023 150th Anniversary Kickoff Black Tie Dinner – Scottish Rite**
 - Jun 24, 2023 Celebration Ice Cream Social – OES
 - Oct 13-15, 2023 Masonic Homecoming Festival – Shrine
 - Dec 10, 2023 Christmas Observance – York Rite
- Other matters for Kevin

COMMUNICATIONS TEAM

Illustrious Craig Horton, 33°

Rory Byers 32°, KCCH

Alex Edmisten, 32 °

- Email etiquette and expectations
- Scottish Rite Journal
- Facebook and Social Media presence
- Webpage (s)
- Trello
- Passport
- Team Reach
- NC Mason in our future?
- Anything else?

AMERICANISM

**Illustrious Tim Parker, 33°
Chairman**

Robert Rideout, 32° KCCH

Illustrious Ron Sortino, 33° Chair Emeritus



Americanism Valley Award: Orient of NC

- Recognize Veterans every meeting-10
- Host program on Scottish Rite Disaster Relief-10
- Visit Veterans in VA Hospital-15
- Volunteer 20 hours total in VA hospital or clinic-15
- Dinner for Veterans or First Responders separate from Stated meeting-15
- Host National Sojourner program-10
- Participate in NLT 50% of JROTC recognition awards in Valley area schools-15
- Participate in two community-wide patriotic national holidays events-15
- One member visits House of Temple and reports impact of Scottish Rite to Valley regarding American history-15

Americanism Valley Award: Orient of NC

- Provide Masonic instructions on our Scottish Rite Creed and its origins in our degrees.-15
- For at least 4 SR degrees, provide education on how their lessons impact the American way of life.-20
- Receive education from a member of the Scottish Rite, who was NOT born in the United States on Americanism.-15
- Attend a Naturalization ceremony and report to the Valley on the process of Naturalization to become a US citizen.-20
- Create an Americanism award in your Valley that recognizes and promotes the local Scottish Rite endeavors to impact Americanism.-15

How To Submit

- **Provide a score sheet and written report on how the emphases of our Americanism initiatives have made an impact on your valley. This will be considered for tie-breaking that might occur and can be a tool for further planning.**
- **Covers July 1 – June 15 each year, due by June 30**
- **The committee on Americanism will make a recommendation to the Deputy or the SGIG and the award will be given at the SOAR, prior to the Valley of the year award.**
- **Any questions should be directed to the Americanism Chairman, Tim Parker, at tim.eyehope@yahoo.com**

Masonic Youth Update

Illustrious Russell Bridges, 33°

Orient Personal Representative

SGC Cole presents \$1000 check for the new H. Lloyd Wilkerson DeMolay Chapter

Sponsored by Orient of North Carolina



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5240

Membership

Jeremy Hicklin, 32° Chairman

Membership

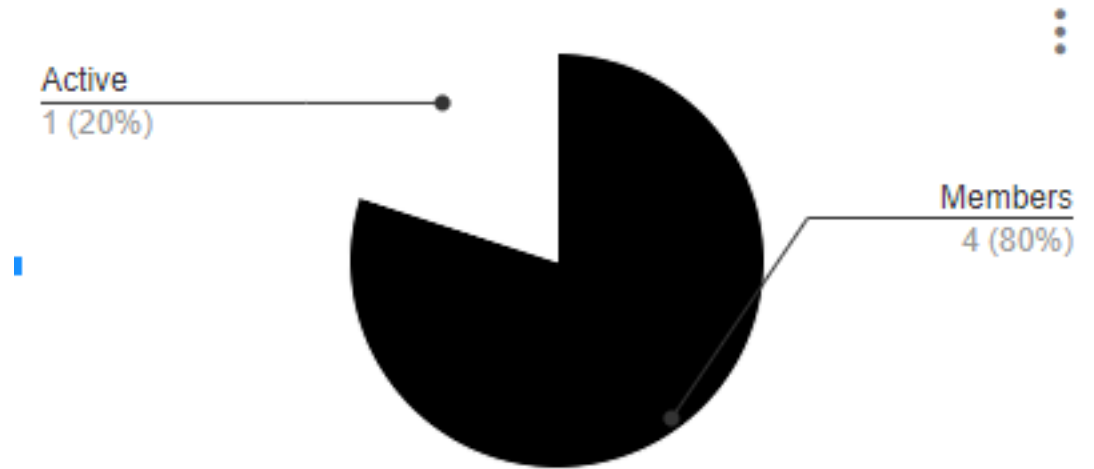
Jeremy Hicklin, 32°

Now and in the Future

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80/20 Rule

Simply put 80% of the work is completed by 20% of the craft.

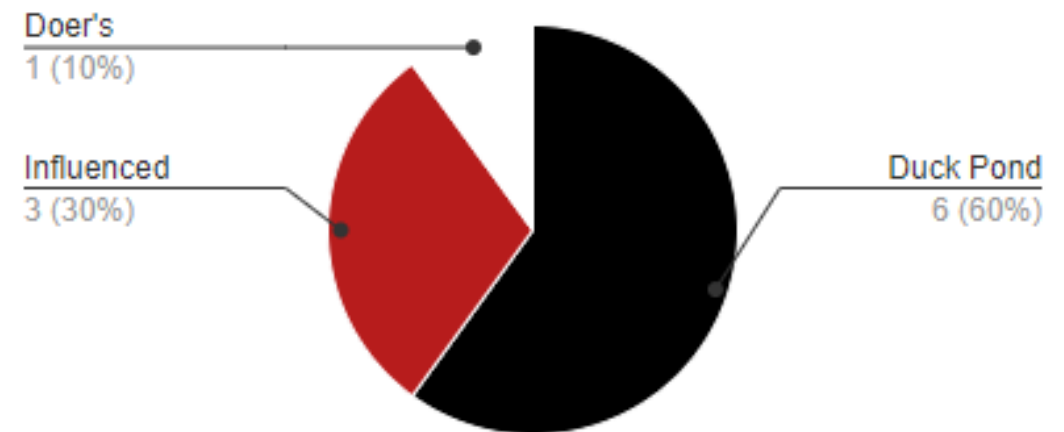


60/30/10 rule

10% are the “doer’s”, simply put they will come in and be active no matter what (The only risk is burnout/or timing)

60% or the duckpond. This group consist of leaders at a bad time, the proverbial cardholder’s

30%-These are the brothers that can be influenced into the 20% of active membership or lost to the duckpond. As it stand this group is the most important for engagement and must be our priority



5/1 Average

Currently we are averaging 1 active member after 5 years.

Goal

What if we could change this to 2? We could exponentially grow our active base year over year, regardless of class sizes. As a result we could accomplish more goals and do more work with a solid and consistent core.

How do we engage?

Blue Lodge

Mentorship



Engagement

Pilot Programs

New Bern - Red & White Hats project

- *Red/White hats to engage blue lodges
- *Present brief Scottish Rite History

Raleigh - Mentor Program

- *Match candidates to mentors
- *Leadership, Ritualism, Stage crew, Esoteric

Long Term Outlook

Programs will be designed to grow organically in each Valley. No Cookie-cutter programs.

Membership committee will meet monthly via Zoom to discuss programs and opportunities.

Secretaries and Personal Representatives are invited to attend.

Actively working with the House of the Temple to compliment engagement programs such as the Sojourner within the Orient.

*A Time for
Refreshment, but
not enough for
sleep!*

Rite Care

**Illustrious Steve Pendergrass, 33°
Chairman**

NC RiteCare 2022





Outcomes for RiteCare from the 2021 SOAR Event in New Bern

- Each Valley shall allot time at every event for updates from our four RiteCare Clinics ... that method of receiving & communicating updates are in the slides to follow ... **ACCOMPLISHED**
- The RiteCare Team Leader shall reach out to each Valley Personal Representative to establish a contribution goal for 2022 ... **INCOMPLETE**
- These contribution goals shall be communicated to the Foundation Board of Directors & the Finance Team for incorporation into the 2022 Budget ... **INCOMPLETE**
- Annual contribution goals shall be incorporated into the Foundation Budget annually going forward ... **INCOMPLETE**



Contributions Update

January 2017 – May 2022 (**\$394,195**)

- Valley Assessments = **\$158,822**
- Member Contributions w/ Dues = **\$26,048**
- General Contribution = **\$130,444**
- Designated Gift to ECU Clinic = **\$5,635**
- Valley Golf Tournament = **\$41,618**
- Amazon Smile = **\$493**
- Afghan Fund Raiser = **\$337**
- Celebrating the Craft = **\$1,095**
- House of the Temple Contributions = **\$25,000**
- Miscellaneous Fund Raisers = **\$1,080**



Allocations Update

January 2017 – May 2022 (**\$394,000**)

Western Carolina University = **\$18,000**

Appalachian State University = **\$173,000**

University of North Carolina – CH = **\$20,000**

East Carolina University = **\$173,000**

Metrolina (New Clinic) = **\$10,000 (reserve)**

Directed (to a Clinic) Donations

Are directed donations a good practice ?

Maybe ...

PRO ... \$\$\$ are received at the specified Clinic to benefit our RiteCare Children

CON ... \$\$\$ are not allowed to reside in the NC SRMF investment funds to earn additional dollars prior to distribution to a Clinic

Should the \$\$\$ reside at NCSRMF until December?



Valley Annual Contribution Goals

PRO ... accountability

CON ... accountability

Scottish Rite Masons
Helping Children Communicate



Individual Funding Impact Potential

5,200 Scottish Rite Masons

$\$1^{.00} / \text{day} = \$18,980 / \text{year}$

$\$2^{.00} / \text{day} = \$37,960 / \text{year}$

$\$50^{.00} / \text{month} = \$3,120,000 / \text{year}$

$\$100^{.00} / \text{month} = \$6,240,000 / \text{year}$

Opportunities - 2022

- Establish New Clinic in Metrolina Area – **delayed on the advice of The Supreme Council**
- Collaborate with UNC-CH to add a satellite clinic in Oxford
- Collaborate with ASU for a successful launch of a satellite clinic in Hickory, NC
- Develop a new approach to fund raising for NC RiteCare – Letters from Home are booked for 2023

Clinic Naming Opportunities

- Western Carolina University Speech & Hearing Clinic
- Appalachian State University Satellite Clinic in Hickory
- University of North Carolina Augmentative & Alternative Communication Clinic
- East Carolina University Clinic for Childhood Disorders

Scottish Rite Masons
Helping Children Communicate

NC RiteCare Team

Steve Pendergrass
Orient Team Leader

Advisory Council

Jim Medlin
David Winslow
Chris Richardson
Phil Shortt

Dan Killian

Western Regional
Advocate
(WCU Clinic)

Clayton Harpold
Asheville Valley Liaison

Drew Norton
Franklin Valley Liaison

Alex Edmisten

West Central Regional
Advocate
(ASU Clinic)

Josh Bristol
Charlotte Valley Liaison

Ken Allen
Winston Salem Valley Liaison

VACANT

East Central Regional
Advocate
(UNC-CH Clinic)

David Griffith
Greensboro Valley
Liaison

Michael Orlando
Raleigh Valley Liaison

Michael May

Eastern Regional
Advocate
(ECU Clinic)

Tim Milby
New Bern Valley Liaison

Justin Wood
Wilmington Valley Liaison



NC RiteCare Regional Advocate / Valley Clinic Liaison

Region Name	Advocate Name	e-mail	Telephone
Western	Dan Killian, Jr.	harvardinvestors@gmail.com	(347) 454-4879
West Central	Alex Edmisten	edmisteninc@gmail.com	(336) 467-4478
East Central	VACANT		
Eastern	Michael May	may.michael1965@gmail.com	(919) 946-3268
Valley Name	Liaison Name	e-mail	Telephone
Asheville	Thomas Allen Jr.	thomasj751@hotmail.com	(828) 450-2191
Charlotte	Josh Bristol	tripletau73@gmail.com	(828) 381-5742
Franklin	Drew Norton	andrew.norton551@gmail.com	(828) 460-0396
Greensboro	David Griffith	davidgriffith47@gmail.com	(336) 403-2833
New Bern	Tim Milby	eli.milby1692@gmail.com	(619) 867-4597
Raleigh	Michael Orlando	morlandosr@hotmail.com	(919) 451-3115
Wilmington	Justin Wood	justin_wood87@yahoo.com	(910) 379-4215
Winston Salem	Ken Allen	gym365advance@yahoo.com	(336) 345-6266



And now, a word from the Supreme Council

- Time reserved for special guests
- Brother Phil Shortt, 32* today
- Illustrious Brother Dean Alban 33* will be at OWLS about Membership



Dispense with Labor and Lunch

Be present at our Table Lord,
Be here and everywhere adored!
Thy creatures bless and grant that we,
May feast in paradise with thee!
Amen.



Afternoon Agenda

- Review of Procedures as needed
- NC Scottish Rite Masonic Foundation
- Links with “Lion and Pillar” Chris Canipe
- Valley of the Year Program 2023
- Golf Tournament Update
- Orient 33rd Degree Team



Afternoon Agenda, continued

- (262/318/5240) 11.1%
- Instructions about Honors for 2023
- Service, Participation, Attendance, Conduct, Education SPACE
- Educational Opportunity Post Reunion: Zoom or in Person
- THE ASSESSMENT
- Per capita increase from Supreme Council
- Wilkerson College, Masonic Youth, RiteCare, 501.c.3 rules
- NO increase in assessment but YES increase in our work



Before traveling mercies...

- **2023 OWLS IS JANUARY 6, 2023, in Winston Salem.**
 - PRs, Secretaries, Orient Chairs, Supreme Council, invited guests
- A new thought about 2023 SOAR. Announcement soon.
- July/Thursday/Dispensation/Friday/Saturday
 - PRs, Secretaries, Orient Chairs, Supreme Council, All Valley leaders, Fellows, potential leaders, interested persons.
- Thank you, Valley of Franklin! Thank you everyone!
- Does everyone have the Right/Rite Heart?
- Let's go to work!