



**Orient Winter Leadership Summit in Winston-Salem  
Personal Representatives, Secretaries, Committee Team Leaders  
Report from the Meeting**

*Those receiving this report should share discrepancies with Deputy before February 6, 2022*

The Personal Representatives, Secretaries, Orient Chairs, and two representatives of the Supreme Council gathered in Winston Salem, hosted by amazing hospitality from members of the Valley, at the Masonic Center on Friday January 28, 2022 beginning at 9:00 a.m.

The OWLS meets in the winter for the purpose of equipping the Personal Representatives and Secretaries with opportunities and resources for each valley of the Orient.

We welcomed everyone and acknowledged those who were “new” to the team in every Valley as well as our Orient Committees.

After the Conference of Grand Masters of North America in February and all of the Valley meetings set for February, a Zoom call with the Secretaries and Personal Representatives will be scheduled. The purpose of this Zoom call will be to hear the reflections, concerns and reactions from the Valleys regarding the matters shared at the OWLS meeting.

After this Zoom call, a meeting will be scheduled with the Orient Chairpersons and their team members to adjust whatever we need to adjust to better equip each Valley with the tools, resources, and opportunities presented.

The Deputy encouraged registration and attendance for the March 26-26 Rite Way Regional Leadership Conference. Personal Representatives, Secretaries, Orient Chairs and their teams, Fellows, presiding officers of each body in each Valley, Treasurers, and the “movers and shakers” in each Valley are encouraged to be present and register early.

After the adjustments, and Regional Rite Way Conference, we will begin to assess the impact we are having and open up the conversation to the attendees of the Summer Orient Advisory Retreat in Franklin July 15-16, 2022.

The 2022 nominees to the Sovereign Grand Commander’s Fellows Program are:

- Asheville: No one
- Franklin: No one
- Charlotte: No one
- Greensboro: John Finney
- New Bern: Matthew Walters
- Raleigh: Michael Orlando
- Wilmington: Nicholas Coffey, Joshua Godwin  
Matthew Ortensie, Brandon Riggan  
Anthony Thornton
- Winston Salem: Thomas Sadler

The Deputy introduced the Personal Orient Representative who will specialize in helping us develop our work with the youth of our Masonic Family, Illustrious Russell Bridges, 33<sup>o</sup>

We welcomed representatives of the Supreme Council who made presentations.

- Illustrious Stan Dodd, 33<sup>o</sup> shared information about the offerings of the Supreme Council concerning membership development. We learned that we are the seventh largest Orient in the Jurisdiction and that were it not for the increase in deaths during the last year, we would have realized a net increase in membership. Death statistics are rising due to the age of our members, COVID, and discovery of deceased members who have been dead for years. Numerous online opportunities exist, and the opportunity North Carolina has with Stan Dodd in place as a member of our Orient (Valley of Greensboro), we need to take advantage of his expertise.
- The Deputy is hoping that a development team leader experienced in grant writing will soon emerge in the Orient to work with Brother Phil Shortt, 32<sup>o</sup> who shared the importance of telling our story with our gathering. From Scholarships to Rite Care to the House of the Temple to the new FREE WILL program, Brother Shortt is our resource person in all areas of development for the Orient AND our Valleys. As soon as we identify an Orient Development Chair, we will connect that brother with Brother Phil to enhance all development activities across the Orient.

The Deputy advised the OWLS of opportunities to make a gift at WhiteStone from the Scottish Rite as an Orient or as individual valleys. Since there was no comment about this as an Orient project, Valleys are free to engage in support of the campaign as they choose.

We also have learned that the NC Mason in its new format is open to the possibility of including news from appendant bodies. This may or may not impact our Scottish Rite Journal Impact. It will be reviewed, and recommendations made from a committee consisting of Illustrious Craig Horton, 33<sup>o</sup>, Brother Rory Byers, 32<sup>o</sup> KCCH, and Brother Alex Edmisten, 32<sup>o</sup>. The Orient will be ready to respond when the decisions are made by the Grand Lodge regarding the NC Mason.

February 12 in Oxford, the H. Lloyd Wilkerson DeMolay Chapter will begin its work. All Valleys are encouraged to send a representative.

The Online petition is live and appears to be working well with no reports of problems yet.

As far as the Orient Degree teams are concerned, host valleys are to carry out the Knight Commander Court of Honor Investiture. The Orient will be responsible for conferring the Thirty Third Degree. Those who want to be part of the team should contact Mike Daniels before March 26.

### **Rite Care: Illustrious Steve Pendergrass, 33<sup>o</sup>**

Orient Improvements involve New Team Structure, Regional Advocates, Valley Liaisons, Advisory Council

There is a new NC Rite Care website ... NC Rite Care

## Financial Involvement in annual clinic allocations from NC SRMF

- 2022 giving/reserve = \$100,000
- \$36,000 to ASU & ECU, \$13,000 to WCU, \$5,000 to UNC
- \$10,000 to reserve for restart of a Metrolina Clinic
- Life-time giving to all Clinics in excess of \$3,255,000

Letters from Home Singers fundraisers 2022 Franklin, July 15th at the Smoky Mountain Theater  
New Bern, October 29th at the Riverfront Convention Center

## Orient Opportunities

- Re-establish a Clinic in Metrolina Includes the cities of Charlotte, Gastonia, Concord, and Huntersville, as well as the large suburban area in the counties surrounding Mecklenburg County, which is at the center of the metro area
- NC Rite Care to become a “household name” with frequent Social Media posts featuring child success stories Identify a “poster child” from each clinic
- Orient website ... for example Orient of Maryland
- Professional Grant Writers ... Find a Grant Professional
- Establish Budgets for annual giving/fundraising for Rite Care
- Orient Digital Store ... for example Shop Groundworks
- Annual golf fundraisers
- Sell out both Letters from Home events

## Team Succession Plans

- Stronger presence at all Valley Events
- Open a LinkedIn Account and follow North Carolina RiteCare
- Open a Facebook Account and like/follow ...
- Orient of NC Scottish Rite Gap International Breakthrough Intensive Participation ...Breakthrough Intensive Thinking

## Western Carolina University

- Number of participants at the Speech & Hearing Clinic in 2021 is approximately 75 per week
- Lifetime giving = \$23,700
- Clinic naming opportunity is available
- Updated WCU Clinic webpage ... Speech & Hearing Clinic
- Camp LEAD (Language/Literacy Engagement & Development) Summer Program launch 2021, 7 children directly assisted with NC
- SRMF funding
- Deputy Cobb, Dewey Preslar, PGM, Steve Pendergrass & local Scottish Rite Masons visited the Clinic in October to announce the support of doubling the size of the LEAD Summer School (2 sessions vs 1 session) and providing incremental funding for various diagnostic equipment
- Presentation of NC SRMF allocation check on Dec. 8<sup>th</sup> Check Presentation

## Appalachian State University

- Number of participants assisted in 2021 = 251\
- 37 children (46 evaluations and 832 therapy visits) in our on-campus clinic or via telepractice. Of these, 13 were preschool children (ages 5 years and under) and 24 were school-age children (ages 6-18 years).
- 89 preschool children were provided speech and hearing screenings.
- Screening numbers continued to be lower than normal this year due to the COVID-19
- In 2019, the Anderson Reading Clinic served approximately 125 children through individualized instruction. In 2020, they moved to their Literacy-Cast model in response to the pandemic and served approximately 275 children and increasing numbers and options in 2021.
- Lifetime giving = \$1,809,000
- \$1,684,200 to the Communication Disorders Clinic & \$124,800 to the Reading Clinic
- 2022 Check & Materials Presentation
- Charles & Geneva Scott Scottish Rite Communication Disorders Clinic
- The Clinic is a part of the Department of Communication Sciences and Disorders in the Beaver College of Health Sciences at Appalachian State University. We serve people of all ages from the Boone region.
- Anderson Reading Clinic: Through the generous support of the North Carolina Scottish Rite Masonic Foundation, our Clinics can provide services to children with language and reading disabilities regardless of their family's ability to pay. The faculty, staff, and students involved in the operation of the Clinic wish to express their appreciation to the Foundation for this support. Each year the support multiplies as our Department of Communication Sciences and Disorders trains more and more students to become service providers for children throughout the state. We estimate that we have trained over 1,600 speech-language pathologists during that time.
- There is also a naming opportunity in Hickory.

## University of North Carolina

- Number of participants assisted in 2021 = 4,700+
- 275 Adult Unique Patients
- 88 Pediatric Unique Patients
- Lifetime giving = \$10,000
- We are in a time of transition at the UNC-CH Clinic. They are in the process of transitioning from the Hanen Centre-Speech and Learning Center to an Augmentative and Alternative Communication (AAC) Clinic ... Alternative and Augmentative Communication Devices
- A proposal for the AAC Program is to be completed and submitted by the end of 1Q22 to the University. This proposal will be shared with NC Rite Care
- Presentation of the NC SRMF allocation check will take place in February

## East Carolina University

- Number of participants assisted in 2021 = 213
- Lifetime giving = \$1,400,000

- Presentation of NC SRMF allocation check on Dec. 3<sup>rd</sup> NC Rite Care Donations Top \$1.4 Million with 2021 Allocation
- Clinic Naming Opportunity is available

#### New Programs in 2022

- Provide interactive continuing education to speech-language pathologists in the management of people who stutter to overcome the barriers of quality of care and access of care In rural, eastern NC. This program will involve partnerships with community organizations in eastern NC and ECU-SLHC clinical staff will serve as peer mentors to newly trained professionals
- Partnership with the Third Street Education Center, a private school for boys located near the ECU Health Sciences campus, to provide speech, language, and audiology services. In addition, we anticipate the development of vocational training to recruit and attract minority students to the field of Communicate Sciences and Disorders
- Funding of professional services in the ECU-SLHC for children who have a “gap” in health insurance coverage. Additionally, some children who attend public schools who would benefit from speech-language services due not qualify under North Carolina Department of Education policy. Funds will be used to address this gap in coverage

#### **Communications: Rory Byers 32° KCCH, presented by Alex Edmisten, 32°**

- Primary charge is to assist the Orient and individual Valleys when requested primarily with social media and graphics.
- Orient of NC Scottish Rite – Facebook Page (A place to share with both brothers & the public) Page created on October 4, 2017. It currently has 864 likes and 930 followers. This was the first Orient Page on Facebook. Several Orients are now following suit.
  - Grand Commander Jim Cole Announcements
  - Grand Lodge of North Carolina Announcements
  - Orient Announcements
  - The Rite News of North Carolina
  - The Rite Review – A Scottish Rite Newsletter from the Valley of Winston-Salem
  - Scottish Rite Golf Tournament – from the Valley of Winston-Salem
  - The Rite Care Update E-Newsletter
  - Wilkerson College Announcements
  - Master Craftsman Certificate presentations
  - Fundraisers for MHCO, Whitestone, etc.
  - KSA Announcements
  - Scottish Rite Awards – JROTC presentations
  - Class photos – from individual Valley Reunions
  - Honors Day Portraits
- Graphics/Website Design
  - I’m happy to edit pictures, design brochures, flyers, and posters, and even assist with website issues for individual Valley and Orient.
  - Example of web design: <http://ashevillescottishrite.com>
- Sentinel
  - Assistance with Sentinel for the Orient.
  - Orient wide communications on behalf of our Deputy

## **Public Relations, Alex Edmisten, 32°**

Ideas presented to improve our public relations included

- SR Friends Dinners & Auction
- Buck a Cup competition over 2 months, sell coupons for \$1 coffee then donations are turned in. The business that sold the most and those that work with it are recognized.
- Shared the “Passport” used in Nashville TN. The gathering was most interested in this opportunity and the Deputy asked Brother Alex to secure a copy of one for every PR and Secretary as well as the Deputy.

## **The Rite News of North Carolina (Insert) Illustrious Craig Horton, 33°**

The following are the article due dates for 2022:

- When submitting documents please use the script
- Give as much information as possible within 200-300 word per article with pictures
- May-June 2022                      March 17, 2022  
1st notice-February 23rd; 2nd notice- March 2nd; Final notice- March 17th
- July-August 2022                      May 15, 2022  
1st notice-April 23rd; 2nd notice- April 30th; Final notice- May 15th
- September-October 2022      July 15, 2022  
1st notice-June 23rd; 2nd notice- June 30th; Final notice- July 15th
- November-December 2022      September 14, 2022  
1st notice-August 23rd; 2nd notice-August 30; Final notice- September 14<sup>th</sup>

## **Americanism: Illustrious Tim Parker, 33° for Illustrious Ron Sortino, 33°**

- Recognize and promote Americanism as an integrated part of our core values as established in our Creed and Mission Statement. (Recite and reference when practical in the Lodge of Perfection)
- See Americanism as part of the foundation of Scottish Rite masonry and not an additional or supplemental event. Make this concept a part of SR Masonic Education.
- Promote SR Americanism in direct dialog at the Lodge of Perfection and in media opportunities at the Valley level.
- Utilize every opportunity to educate the value of American origins and experiences of our members and how those relate to our values and outcomes. Seek opportunities to engage this with our youth through DeMolay and Rainbow Girls.
- Organize and support JROTC Americanism Awards at participating high schools and colleges in the Valley and seek engagement with the programs
- Encourage Americanism research and involvement through our Scottish Rite Museums and Libraries, many on-line.
- Recognize impacts of Veterans, educators, lawmakers in their contributions to Scottish Rite values.
- Recognize and promote the value of volunteerism and those who serve others through unselfish acts of kindness.
- Create an Americanism Award at the Orient level. This would be a yearly award presented to the valley who demonstrates the true spirit of Scottish Rite Americanism

through their programs and efforts to promote and recognize our core American Scottish Rite values.

### **Membership: Illustrious Johnny Surles, 33° “Eight Points of Emphasis 2022”**

- Need a chair in each Valley. This has been done. They have been identified and contact info has been obtained.
- These Chairs need a contact person in each Lodge in their Valley.
- It is requested that someone takes notes during meetings of the Valley. This will include Advisory Council, winter or summer workshops, LOP meetings. If you can't make these meetings, the Secretary of the Valley has minutes and will provide you with them.
- These notes should filter down to the Lodge contact so he can distribute to all Scottish Rite Members in their respective Lodge.
- Membership Chair should attend Advisory Conference meetings if possible and take notes to be passed down to the membership.
- Lodge Chair (or a Scottish Rite member) should present a Scottish Rite gift upon raising. At least a pamphlet.
- This will keep the Craft informed of what is going on in the Valley and hopefully will create an interest to get members back to LOP and Reunions.
- Membership Chair should plan at least one Lodge visit and present a Scottish Rite Program. Material is available at the House of the Temple.

### **Reports from the Valleys of the Orient**

#### Greensboro

- Planning on doing all degrees in person in the fall, ways to re-engage membership and interest from members that might not be coming.
- It's a way for some virtual members to see it in person.

#### Asheville

- Valley is doing well without meeting for about a year due to Covid and new members are helping with degree teams and fundraisers.
- Better attendance in person than online

#### Franklin

- Membership is the big push, west of Asheville Waynesville West, trying to visit the Blue Lodges in NC and Northwest GA for new members.

#### Winston Salem

- Always have 2 masonic programs, one at dinner and then the other during the stated.
- Researching Medal of Honor Dinner

#### New Bern

- Trying to make a transition from doing things the way we have been doing things. Goal is to reinvest and increase membership is key.
- “If we don't focus on building our numbers there will not be a Valley.”
- Time of transition in buildings, meeting and how they conduct Reunions / Degrees.
- Where are we going in the future?
- Reenergize the members and meetings.
- How do we do that?

- Some people want more than seating in a regular meeting.
- Possible building project.

#### Wilmington

- Great rental program.
- Always have a meal at stated and always to try to meet everyone at the door to welcome them to the Valley Meeting.
- Try to have educational meetings at all meetings.
- Send new packet of information to all new masons.
- Welcome letter, purple SR booklet with card to contact.
- Every member is a hybrid meeting, zoom and in person.
- In person attendance is going strong and each meeting giving time for Rite Care update.

#### Raleigh

- New building location,
- Lodge location that has helped with structure costs.
- Membership increase, trying to get in every lodge in the Valley with new brother information and try to put together a degree team to represent the Valley.
- Turnover in leadership with new PR and new Valley Sec.

#### Charlotte

- Completion of the long-range planning committee.
- Still searching for new vision committee. Fall Reunion had 19 new members in person.

Deputy Cobb commented that we do not have problems. We have multiple opportunities to renew and strengthen and keep in balance what it means to be a Scottish Rite Mason. Remember, the wise old OWL represents that wisdom that is supposed to keep us “balanced.”

After a wonderful lunch, Illustrious Shaun Bradshaw.33° offered a presentation on the use of Trello, a free computer “card based” system to organize and do strategic planning. So much gets lost in the process of long-range planning and this free program utilized can help keep track of everything. Since the meeting, two other Valleys have already begun to utilize the program.

After the Trello presentation, we addressed our final issues.

- What’s happening with Master Craftsman, Study Groups, Research?
  - These are functioning as best they can during the Pandemic.
- What’s happening with Wilkerson College?
  - Valleys are paying their assessment and there are no additional needs at this time.
  - Early assessment payment is encouraged.
- What happened with Insurance Matters from Supreme Council?
  - The Deputy reminded everyone to comply with Supreme Council and do not have a lapse of coverage.
  - One of our brothers reached out to other Orients to assist with the best of intentions and it was not universally received well. Our brother was only trying to assist based on what he believed needed to be done.
- What’s happening with the online petition?
  - It is live and appears to be working
- What is expected about NPDs? Bills? Fiduciary Reports? Bylaws?



- The Deputy expressed concern about hasty moves to NPD members. If the statutes or Grand Lodge require it, it will be approved, however 2 and 3 year suspensions will at least require the name and number of the subordinate lodge where the brother is a member.
  - The Deputy commended the Orient for prompt payment of bills while recognizing the recording of payments are not always promptly entered into Sentinel.
  - When reports are due, cooperation toward completion is appreciated.
  - A signature page was attached to all bylaws at this Conference and will become a part of the Annual OWLS agenda to ensure the bylaws are current.
- The NCSRMF Assessment: Too much or not enough?
  - The Deputy proposed consideration of increasing the \$5 per member assessment to the Foundation for Rite Care to \$10 and allowing Valley's to use Fund Raisers to offset the expense. There was no objection. The only comment that resonated with everyone present was "It's just five dollars."
  - An edict will be forthcoming.
- Orient Golf Tournament
  - Illustrious Kirby Matthews 33° shared the results of the 2021 Tournament and upcoming plans to meet and plan the 2022 Tournament. The team is looking at two possible sites in 2022 so that a broader reach of the Orient may be secured.
  - He also suggested a "golf outing" during SOAR in Franklin and possible other times when we might just have some fun and maybe even "raise some money."
- Digital Store
  - Illustrious Michael Fischer 33° and Steve Pendergrass 33° will continue to explore how to involve Valleys that want to participate in this program and a decision will be made at the SOAR.
- February 12, 2022, H. Lloyd Wilkerson DeMolay Chapter-Oxford.
  - The Deputy encouraged representation from all Valleys at this 1:00 p.m. event.
- Statewide Reunion for Illustrious H. Lloyd Wilkerson, 33° SGIG Emeritus
  - New Bern as the home Valley of our late Sovereign Grand Inspector General will likely name an upcoming reunion for him.
  - The Orient will consider how to honor the late SGIG in consultation with the Deputy, Personal Representative and Secretary of New Bern.
- There will be Zoom Meetings prior to OWLS and SOAR
- Over \$4,500 has been given by the Orient of North Carolina in memory of our beloved late Lieutenant Grand Commander, Illustrious Michael D. Smith, 33° and SGIG of our neighbors in South Carolina.
- The Deputy announced the York Rite Maggie Valley meeting in July where the Sovereign Grand Commander is "rumored to be speaking. We might want to attend, especially those of us who are already York Rite Masons and remaining in Western North Carolina for the later part of the week when SOAR and the *Letters From Home* Concert will be in Franklin. This show of Masonic unity and support of York Rite is encouraged.
- After the February Stated Communications, PRs and Secretaries will report any feedback to the Deputy and a meeting will be scheduled with the Orient Chairs to begin preparing how to deal with the feedback in preparation for SOAR, July 15-16.
- We adjourned at 2:53 pm, took some pictures, and headed out our destinations in the hope of not meeting bad weather.