

*NATIONAL SOJOURNERS, Inc.*

*National Line & Staff Officers  
Handbook*



*Serving The Order*

*With Pride and a Vision of Excellence*

This Handbook is a compendium of input from the current  
2009 - 2010 National Line Officers, and Past National Presidents.  
Inaugural Edition ~ June 2010

## Who Are We

The National Sojourners National Line Officers serve the entire National Sojourners organization. They are the senior leadership and provide the direction of the Order. Ideally, the National Sojourners Line Officers work in close harmony and consensus to maximize and ensure to the fullest extent possible that the good of the Order is held paramount and individual agendas are secondary and complementary to the consensus.

The National Line is composed of three National Vice Presidents (N1VP, N2VP, and N3VP), the National President-elect (NPE), and the National President (NP). The delegates at an Annual Convention elect the VP's and NPE for a period of one year. The NPE - by definition - becomes the NP.

The Line works directly with and receives advice from the Trustees, Committee of 33, and Past National Presidents, while considering recommendations from the other National Committees of the Order.

The National Line Officers work closely and directly with the Committee of 33. No topic is outside of the scope of the Committee, although the results of the analysis of a given Task may result in referral to another committee or subordinate body of the National Sojourners organization, e.g., Trustees, Resolutions Committee, Americanism Committee, etc. Where the Committee's findings are a departure from existing Regulations or By-laws, the results of a Task may be put to a Resolution for consideration of the delegates of the Annual Convention.

Formalized Tasks are presented to the Committee of 33 to mature the informal input received from other sources of the organization. These Tasks may suggest a Policy change, an operational shift, a change in organizational Regulations, or a change in the By-Laws. The source of the Tasks typically is from the National President (NP) or National President-elect (NPE), but members of the Committee can present Self-Tasks for consideration. Likewise, any member of the National Sojourners organization can present a Task.

~~ *even more NOTES* ~~

~~ more NOTES ~~

### We March to The Tune

The National Line Officers follow all National Regulations, but with a focus on Natl Reg 6.2, in its daily business. We meet at the Annual National Convention (ANC) and the Mid-winter Meeting (MWM) of each Sojourner Business Year, as a standard business practice. We have also adopted the policy of meeting at Headquarters in early October along with the Trustees and the Collingwood Board. Not surprising, we take work home.

It is incumbent upon us to have a pulse of the entire organization and from every perspective that makes the organization run as a well-oiled machine. Conceptually, we point ourselves in the right direction through a Blue Print for the Future. At the highest level, it tells us what we need to address for success - Membership, Operations, Finances, Outreach, and a Strategic Plan. We achieve our level of success by providing a dynamic Strategic Plan, i.e., we update it yearly and roll it out with the new administration.

Clarity of vision comes through working together - as a Line of National Officers, with counsel from Past National Presidents, with counsel from other National Officers, with counsel from the Committee of 33, and keeping our ear to the ground at the grass-roots level - our membership.

Objectivity is a difficult position to attain, but we strive to that end. Our vehicle for keeping objectivity in sight is the Area and/or Regional Representative. They best know the nuances of their geographical coverage, and we must rely on them to give us quality input so we recognize properly how to handle those areas that need attention to ensure a quality, growing organization.

### Who Drives the Train

The respective duties of each office are dynamic and at the direction of the NP, except where defined by National Regulation, but as a rule-of-thumb and for continuity, the following responsibilities apply to each office:

#### NP:

Our Chief Executive Officer. Predominantly, he has contributed to the foundation of the Strategic Plan for his year. The Goals and

Objectives (G&O) have been clearly defined in it and are present for all to see through several media, especially the National website. Now, he tasks his Line Officers to execute them, while assessing the successes and the failures, so the next iteration of the Plan can be refined and made ready for execution at the next administration. The NP has work to do, while being our Number One Emissary. He has Oversight for:

1. **National Trustees**

As National President-Elect (NPE), he established and got financial endorsement of his programs. Here, he works to ensure the fiscal soundness and viability of the G&O's he has put in place.

2. **Committee of 33**

As NPE, he delivered his Taskers that either were an imperative to his year as NP, or that were of need to the organization for its continued improvement. Presumably, they had a suspense date that permits decision-making and implementation for the refinement of his year as NP. He maintains diligence over current activities to ensure timely, necessary action. Oh, as you begin your year, one of your first duties before leaving the ANC is to install the Committee of 33 Chair, Vice Chair, and Secretary/Treasurer, whom they elect from within.

3. **Nominating Committee**

In very close coordination with the Committee Chair and National Secretary, he ensures the Committee is ready for business at the ANC.

As the Number One Emissary of National Sojourners, he will spend considerable time visiting with the Chapters of the Order, and attending other Masonic Orders' special events. He must do this to advance our name and our contributions to the community of Masonry and society in general. This necessitates a very close communication with the National Secretary and the NPE.

**NPE:**

While our NP is advancing our objects through visitations, the NPE is keeping close coordination with the National VP's. Collectively, the pulse of the Strategic Plan is being taken - soft spots are firmed up,

him, so keep receipts of necessary preparation items you must get.

- ★ Obtain in advance the recipe for the grog and the needed supplies.
- ★ work with N3VP-Elect to have good ceremony. Typically, be ready to entertain NLT 1700 hrs.
- ★ Keep a sharp eye on the cups !!!!!!!!!!!!!

✓Nomination – Get your form for the next position in to the NS/T !!

✓Order of Ceremonies – give the Toast to the Flag at Opening of sessions, if NP wishes.

✓In-House –

- ★ coordinate the National Line Ad for the ANC Program Book
- ★ Gift – you get the gift for the NP. It is presented at the ANC; coordinate with NP's First Lady.
- ★ get bill for First Lady's gift from NPE, and consolidate expense. Bill each Progressive Line Officer proportionate amount.

**NS/T:**

✓Too many to mention – trust him, but keep him straight.

**Natl Chap:**

✓ Candlelight Memorial Service – Have the Kit at ANC.

~~ NOTES ~~

- ✓ Order of Ceremonies –
  - ★ have a copy and be familiar for both the MWM and ANC – backup to NP.
  - ★ lead the *Pledge of Allegiance* at Opening of sessions, if NP wishes.
- ✓ Nominations – get Area and Rgnl Reps, and Committee Chairs firmed up and to NS/T NLT COB February.
- ✓ Award – you should be the primary source of nomination for the Memphis Cup. Tell the NP your choice.
- ✓ Reports – prompt your Area and Rgnl Reps to get them in on time.
- ✓ NASOCOCO – be ready for your appointments.
- ✓ In-House ~
  - ★ be ready for your National Convention – all of it from dinner to business !!!
  - ★ prepare and share your plans and programs for your year with the PNP's.
  - ★ Gift – you get the gift for the Natl First Lady. It is presented at the ANC; coordinate with NP. Give bill to N3VP, who will consolidate expenses for billing.
  - ★ and don't forget to coordinate the PNP Plaque for the out-going NP.

#### N1VP:

- ✓ Nomination – Get your form for the next position in to the NS/T !!
- ✓ Order of Ceremonies – give the *Purposes* of National Sojourners at Opening of sessions, if NP wishes.

#### N2VP:

- ✓ Nomination – Get your form for the next position in to the NS/T !!
- ✓ Gifts & Bequests – ensure development of the coming NP's Pin, which supports Annual SEM Fund Campaign.
- ✓ YLC Campaign – establish thresholds and publish donors in *The Sojourner*.
- ✓ Order of Ceremonies – give the *Pronouncement* of National Sojourners at Opening of sessions, if NP wishes.

#### N3VP:

- ✓ the Ankle Breakers
- ✓ you will be contacted by a PNP in advance and preparation for the ANC. Costs will be paid by

failures are "shot," and newly identified "hot buttons" are integrated into the *Strategic Plan*. This scrubbing needs to be complete and ready for roll-out at the National Convention following his installation, as NP. This approach applies to *The Blue Print for the Future*, as well. He keeps close contact with the NP and Natl Scty, so he can ensure the continued running of the Train. All the while, he is keeping a pulse on his Oversight and preparing for the coming year. While at the MWM, he must collect as much information as possible on names for the Area and Regional Representatives' positions, and for the Chairs and members of each of the National Committees - except the Committee of 33, who are elected from within at the ANC.

He has Oversight for:

#### 1. Area & Regional Representatives

Arguably, this is the most important entity in the organization. These members are keeping a regular vigil over the viability and effectiveness of the Order. The NPE must monitor and excite these members to fulfill their appointed duties, so our Order remains strong. Their regular and timely reporting, as prescribed in the Natl. Regulations is essential ... prompted by the NPE, when necessary.

#### 2. Chapter Revitalization and Chartering

Hand-in-glove with the Area & Regional Reps., this function speaks for itself. The National Secretary is the best person to make the assessment of our Order's strength by his daily contact with Chapter officers and the Reps. The NPE and National Secretary must communicate regularly, so everything is all right.

#### 3. NASOCOCO

This is among the most challenging of requirements. It is complex and needs constant monitoring to ensure we are well established with meeting schedules (Mid-Winter and Annual) in a timely and well communicated manner. Ideally, contracts should be tendered two years in advance of the event. Caution must be taken to not "meddle" in their business, as they have enough challenges, but identifying choke-points

early and proposing solutions will reduce crises at the 13<sup>th</sup>-hour. Maintain this delicate balance and harmony will prevail.

### N1VP:

As the senior VP, he must take the lead role in the mentoring of the two more junior VP's. Further, he should bring the input of the other VP's together, so the NPE and NP need only have an Executive Summary of the issues at hand. The NPE and NP will take the lead on drill-down discussion of any issue that warrants extended attention and/or discussion. Topics that affect the Blue Print and Strategic Plan are paramount.

He has Oversight for:

#### 1. Americanism Committee

This is what we are about, so clearly, it commands attention front-and-center. You must ensure a strong Chair and make that recommendation to the NPE during or immediately following the MWM. Keep a close pulse on the National Essay Contest and the Youth Leadership Conferences (YLC). Validate that the curriculum is what we expect and want at joint and Sojourner sponsored YLC's. Ensure that our working agreements with other patriotic organizations, e.g., MOWW and SAR, achieve our objectives. Ideally, we should have a National Sojourner attend or make an appearance at each YLC. A National Line officer, notably the NP, should ensure an appearance at the Freedoms Foundation at Valley Forge YLC (FFVF). Given this venue, an appearance by the National Commander of Heroes of '76 - in dress Colonials - would make a nice impression.

#### 2. Incentives and Awards

The wages of a Master Mason are meager at best. Ensuring that our Brethren are properly recognized for their effort is essential ... yes, and Ladies, too. Of equal importance is ensuring that recognitions are properly presented, i.e., public and with pomp-and-circumstance. Engender pride not just in what they do, but what they have achieved for the efforts. Attend the Area and Regional Reps meetings and get them engaged in this process - personally.

## HOT BUTTONS

### ALL:

- ✓ Reports – ensure Report ready for the end of the MWM using MWM business, and ANC ready 01 May. Introduce your Committee Chairs for their Reports.
- ✓ Oversight –
  - ★ share all findings and input with all Line Officers to ensure overall improved functioning,
  - ★ give NPE your thoughts about appointments – current or replace.
- ✓ Mentor – work and help all Committee Chairs and Representatives to make them successful.
- ✓ Service to the Craft ~
  - ★ Attend your home Grand Lodge's Grand Annual Communication as National Line Officer. Get the progressive GL Line into our Order.
  - ★ Attend the Conference of Grand Masters In North America (COGMINA).
- ✓ Presence – Be at Area Conferences and Encampments, as well as Chapter meetings, wherever practical.

### NP:

- ✓ Service to the Craft – attend or have representation at all National-level appendant body meetings, where invited.
- ✓ Protocol – ensure Grand Officers visiting our MWM and ANC have escort, as appropriate.
- ✓ First-Timers – be FULLY engaged. Greet these Brethren personally.
- ✓ In-House – let your National Commander of Heroes know you are there for him. Pulse with your National Officers – Committee Chairs, Representative, etc.
- ✓ Order of Ceremonies – have a copy and be familiar for both the MWM and ANC. Conduct the sessions.
- ✓ Awards – remember, you are the sole person to select the Houghton Memorial Award. Keep tabs on Hon. 3<sup>rd</sup> Lt., USMC; and Old Goat – avoid surprises !!!
- ✓ CLMA – remember, you are an “ex-officio” Director at a minimum. Help CLMA !!!

### NPE:

- ✓ Cof33 Taskers – get them to Cof33 timely, so results ready upon taking office as NP.

### National Resale Activity

The keeper of the "groceries" of our Order is the NS/T. He advises the Board, who make determinations of the needs of the membership and its constituent Chapters.

### National Chaplain:

Keep us ever mindful of our duties to God, our Brethren and Ladies, and what is right in the world - we need you to help us lead. Don't forget that we pay homage to those that have gone before us, so be prepared to conduct your *Candlelight Memorial Service* by having at the ready the kit of items needed, e.g., candlesticks, candles (red, white, and blue), matches, and the prayers cards of symbolism for each color of the candles. Your buddy the National Secretary will have the Holy Book in place. Where duty calls, take care of those Heroes, too.

### National Staff Judge Advocate, Surgeon, and Historian:

Your guidance is clearly stated in Natl Reg 6.2. So go do it and help make us whole.

### By The Numbers

The National Line & Staff Officers follow all National Regulations, but with a focus on Natl Reg 6.2, in its daily business. You have a formidable job and the National Regs and Circulars will serve you well in making intelligent decisions, but nothing can replace consensus - seek advice and counsel from your counterparts in the Line and the Has Beens - they have traveled the road and are an invaluable resource. And ...

### REPORTS !!! National Line & Staff Officers

Yup, those listed above have a need to submit their Reports to the National President in advance of the ANC. Be ready, but take your lead from the National Secretary - he'll prompt you - but it isn't a surprise. Now, take a look at the **HOT BUTTONS** - bullets specific to you.



### 3. Publications Review Board

Our integrity as an Order is manifested in our publications. Working closely with the National Secretary, this job can be easy, but still requires your insight and improvement, wherever possible.

### 4. CLMA Liaison

Here is another of those "close coordination" endeavors. Our "home" commands our attention. The Liaison program, then, becomes key to our viable, supportive relationship. Work with the appropriate Director to determine how we can best promote CLMA. CLMA has its own training and support programs for the Sojourners Chapters' Liaisons. Ensure through our Area and Regional Reps and the CLMA Director that we have identified someone for each Chapter to be the Liaison and ensure they know how to "connect" to their page on the CLMA website. Then, get them working.

### N2VP:

You are a seasoned warrior, but then again, you have much to experience at this level, so be diligent to educate and diligent to learn. You have just graduated from the ranks of the Ankle Breakers - whew - but hopefully your legacy and tutorial will serve us all in this noble tradition. From fun to fruition, you should be well on your way to making an impact for advancing our Order. We have worked together and that integrity must prevail - Team above all. Mentor your successor.

He has Oversight for:

### 1. Membership

The cornerstone of the Order is the leadership, but you are in charge of the bricks to get us to the cornerstone. Keep us - the Line - abreast regularly on our status. Be creative in your thoughts of recruitment, but never, never lose sight of retention. In a perfect world, we would not need Revitalization, but alas we have it and we cannot do without it. You, however, can help offset the inevitable. Look for the incentive, indeed, the motivator that will get us that next, active member. Sell our product ... get the word out to all on that magical thing that works. Listen to

all who have a story to tell, because what works here may not work there and every option should be on the table.

## 2. Gifts and Bequests

Talk about ingenuity and possibilities ... this is where it is. Everyone knows about these things from every organization they belong to and those they don't belong to. We have a great Order with a great message for all our citizens. Presenting it with excitement will get the return to us rather than another organization. Work toward: A.) The Annual SEM Fund campaign is the NP's chant. To help him succeed, you should develop right away the lapel pin for him to use - him being the NPE. Work with him and present it to him for final approval at the MWM. This allows for production-time and availability at the ANC following his installation. This should be coordinated with the National Secretary. B.) Establish and maintain a "giving program" for supporting our YLC's - see the current Blue Print for the Future - with an incentive methodology, e.g., publish names in The Sojourner that categorizes contributors by dollar thresholds such as *Players, Winners, and Champions*.

## 3. Fraternal Liaison

Outreach is our bread-and-butter. We cannot afford to be introspective in our offerings. We must begin with the Grand Lodges and extend beyond to the other Orders in our Craft. The Chair of this most important committee, in conjunction with the National Secretary, can and will provide us with the necessary plans for building this edifice ... we need to ensure we develop the tools to put it together - with quality and d'aplomb. For example, you will need to pull together the plan and execution of the Fraternal Liaison Breakfast presented at the Conference of Grand Masters In North America (COGMINA). This will include close coordination with the National Secretary to get the Sojourners display unit to the city of the COGMINA, getting support of the local chapter(s) for staffing the display, and getting the commitment of the Line Officers to be present and to support the staffing of the display. Again under the current

Blue Print for the Future, develop an Outreach *Plan Of Action & Milestones* (POA&M), as noted under Tasking 1. This latter initiative should focus on COGMINA, but other creative methodologies and applications will only serve to enhance our objectives.

### N3VP:

Welcome aboard !! Such a baptism - "The Ankle Breakers" - you are now a part of the club. Refresh your memory, because you will not only need to repeat the ceremony in a year, but teach your successor.

He has Oversight for:

#### 1. Bridge of Light

The grass roots of our Order are founded here - what we can do for our Grand Lodges, their constituent Lodges, and the Appendant Bodies - adult and youth. This is a hand-in-glove portion of our Americanism Committee. The focus is communication within the Masonic Community and its appendant organizations, where Americanism will reach out to all aspects of our society - schools, facilities for the aging, and everything in between. Ensure that there is a connection at every level to reach our Masonic relations.

#### 2. Education & Training

We must keep abreast of every aspect of our Order's objectives and the improvements we make to that end. So, we must develop the tools to "build our house" and then teach the Craftsmen of our Order, so they can go build America and Masonry. Not surprising, coordination is essential with the Area and Regional Representatives - teach them first - this is the "Train the Trainer" concept. Then get them to reach each Chapter's proper representative - then we are all smart !!!

### National Secretary/Treasurer (NS/T):

Our Chief Operating Officer. If there is anyone who must know the encompassing in's-and-out's of the National Sojourners, it is this man. His responsibilities truly transcend the National Regulation(s). He also serves as the Adjutant, Heroes of '76, in much the same capacity as the Secretary, but remember, the Heroes have no money, so he has no need for accounting in this position.

He has Oversight for: