

Prepare the session

Purpose

Help participants explain one defensible funding calculation and identify what must be verified before a dues decision.

What to bring

Guide r2.2; worksheet pack r2.2; optional matching calculator on a desktop; printed number key, P1-P2, T1 and W1-W8; G1-G2 for follow-up; ordinary calculator. Use the fictional Cedar figures below, not private member accounts.

People and preparation

Facilitator, a willing investigator, independent arithmetic checker and recorder. Include the Secretary, Treasurer and property representative when available. Real decisions require the governing procedure and verified evidence.

Choose the right setting

This is a 75-minute practice workshop, not a complete investigation or a dues vote. Cedar is fictional. Its examples teach the method; they are not a recommended rate for your lodge. Use annual dollars and retain calculation precision until displaying results.

How to use this companion

Read SAY passages aloud or adapt them in your own voice. DO passages are facilitator instructions. Replace bracketed names and dates before use. Every scenario identified as fictional is practice material, not evidence about your lodge. The meeting on page 4 is a separate session, not extra time inside the workshop.

Keep the set together

Guide and calculator revision 2.2 is the matching source. Existing guide and forms remain the authority for the workflow. This companion adds practice and meeting structure; it does not replace permission records, privacy procedures or governing approvals.

Workshop script | opening

0-8 minutes | Begin with purpose

SAY: “Before we choose a number, what should this lodge reliably make possible? A building, a bank balance and a dues bill are means. Name an experience a member or community partner could recognize.”

DO: Have pairs draft two plain sentences for P1, then one practical next-year step for P2. Read two examples. Record disagreements rather than forcing instant consensus.

8-18 minutes | Follow the property cost

SAY: “Cedar Temple has a \$24,000 fully funded plan and \$6,000 from other occupants. Under its fictional agreement, the lodge supplies \$18,000 in rent. That rent goes into the lodge plan once.”

DO: Show T1 feeding W1. Ask why adding the temple roof, utilities and insurance again would duplicate costs. If your lodge owns its building directly, use the appropriate ownership schedules; do not invent rent to itself.

18-30 minutes | Build the funding gap

SAY: “Cedar chooses Vitality: COST is \$30,000, including rent. OTHER is \$6,000 of dependable non-dues income. GAP is COST minus OTHER, with a minimum of zero. What evidence would we need for each line?”

DO: Calculate $GAP = \$24,000$. Link costs to W1, evidence to W2 and income to W3. Label verified, explained estimate and unknown as V, E and U. A blank is not zero. Do not use a bank balance as recurring income.

Workshop script | practice and close

30-43 minutes | Reconcile expected payments

SAY: "Cedar has 72 members: 60 full-rate billings, six full remissions, four prepaid or life members, and two other full exemptions. Its 95 percent collection estimate applies to the 60 bills, not all 72 names."

DO: On W4, verify $60 + 6 + 4 + 2 = 72$. EXPECTED = $60 \times 95 / 100 = 57$ full-payment equivalents. RATE = $\$24,000 / 57 =$ about \$421.05. These are payment equivalents, not a count of particular men. Partial bills need a separate schedule.

43-55 minutes | Check backward and stress it

SAY: "Cedar considers \$425. Expected dues are \$24,225. Add \$6,000 OTHER and subtract \$30,000 COST: the projected BALANCE is \$225. A proposal is useful only if we can explain it backward."

DO: Pairs reproduce the calculation. Then change collection to 90 percent: EXPECTED = 54; required RATE is about \$444.44; at \$425 the BALANCE is negative \$1,050. Do not round EXPECTED to a whole number in other examples. Agree what evidence might change the assumption.

55-67 minutes | Test the work behind the number

SAY: "A balanced annual plan can still run short in winter or depend on an unwilling volunteer. What arrives when? Who has actually accepted the work? What is the private hardship route?"

DO: Identify checks for W5 cash timing, W6 accepted hours and fallback, and W8 choices and commitments. Put private hardship circumstances outside circulated copies. Assign missing evidence, including property arrangements and payment fees, to willing investigators.

67-75 minutes | Explain the proposal plainly

SAY: "Use W7 and W8 together: purpose, annual need, dependable income, expected payments, proposed rate, balance, cash timing, work and alternatives. We are practising an explanation; today's Cedar calculation does not authorize a bill."

DO: Each pair gives a one-minute explanation and one remaining uncertainty. Name the next evidence task and review date. Use G1 for any adjustment-rule design and G2 to preserve the eventual reason and approved record.

Sample 45-minute dues working meeting

Before the meeting

Circulate P1, completed W7-W8 and a readable evidence summary beforehand. This is a proposal discussion. Any formal vote follows verified notice, eligibility, quorum, approval and effective-date requirements.

0-5 minutes | Chair states purpose and decision stage

Identify whether the meeting discusses, recommends or is lawfully authorized to decide.

5-12 minutes | Investigator presents purpose and current obligations

Separate temple and lodge costs; show the proposed experience and the evidence.

12-22 minutes | Checker walks through W7

Trace COST, OTHER, BILLS, COLLECT, EXPECTED, RATE and BALANCE. Correct errors before debating the preferred rate.

22-32 minutes | Compare alternatives and W8 commitments

Discuss a lower-overhead option, phase-in funding, cash timing, private relief route, willing workers and a harder year.

32-40 minutes | Record unresolved questions and next procedural step

Assign evidence tasks. If a rule change is proposed, use G1 and verify applicable requirements before adopting wording.

40-45 minutes | Read back actions and preserve the rationale

Use G2; record the decision stage, authority, owner, deadline and next member update.

Closing words

SAY: "The proposal funds [purpose]. Its assumptions are [brief list]. Before [next decision], [person] will verify [item]. The Secretary will confirm [required procedure]. We will circulate the corrected figures by [date]."

After the meeting

Keep the calculation, evidence, alternatives and exact approved wording together. Circulate aggregate assumptions, not personal hardship details. A calculator printout supports the discussion; it does not establish authority or replace the adopted record.