

MCF Members' Meeting

Royal Masonic School, Rickmansworth

Sunday 22 July 2018

Chief Operating Officers report

Ladies and Brethren,

At our Annual General Meeting in December we launched a strategy which will guide the MCF and we hope will enable us to achieve our aspirations over the next three to five years.

We have a very clear vision of our responsibilities towards the Masonic community and society more generally. As we deliver our enhanced programme of support and services, it is important that we pay careful attention to the manner in which we do so. Our values, very recently adopted, will provide guidance on how we carry out activities “the MCF way” and how we behave and communicate with each other and the communities that we support every day.

Those values that we will strive to uphold throughout the MCF are, that: -

- We will be **Responsive to need**
- We will **Make a difference**
- We will always **Strive for excellence**

Clearly the MCF is still in its early days, but over the next few minutes I will try to give you some flavour of how we are bringing our new values to life on a day-to-day basis and share with you some of our early achievements.

We will be **Responsive to Need**

By this we mean “We are a **listening** and **inclusive** organisation which identifies **need** and provides essential **support** to the **communities** with which we work”.

Let me give you a few examples of how we are listening and responding to need.

- Last year, our enquiries, which exceeded 9,000, resulted in the payment of over 7,000 grants to over 4,000 Freemasons and their families totalling over £12M. Proving we really are responding to need.
- Before we launched, our enquiry service received between 200 and 400 calls per month. We now regularly receive 800 calls. There is a strong correlation between our marketing activities and the call volumes we receive from those seeking help. The main driver for enquiries has been our new bi-annual Better Lives magazine, which has grown from a circulation of 20,000 for issue 1

to 80,000 for issue 4 and continues to grow. Our stakeholders wanted better, more current information on the MCF and we are delivering.

- Our donors make a significant contribution to all that we do and for their generous support we are immensely grateful. We will continue to work closely with Provincial and Lodge Charity Stewards to support them in their fundraising for the MCF. Following extensive consultation, our fundraising materials have recently been updated and are available on our website now.
- Fundraising is becoming more and more competitive and we need to stay one step ahead of the curve. Recently there have also been significant innovations in the Relief Chest Scheme, where we have again listened to our supporters and introduced Individual Relief Chests to help better manage charitable giving at an individual level. We have also vastly improved our on-line fundraising platforms, making the process of fundraising so much easier for all those involved.
- Last year, we reported a very healthy income from legacies in excess of £4.8M. We have worked hard to promote the value of making a will, bearing in mind at any one time it is estimated that only one third of the UK population have written a will, meaning that many will die intestate and their estate may not be distributed

as they would wish. To further assist in this process, we have recently joined with The Goodwill Partnership, the largest distributor of home-visit-solicitor-provided wills in England and Wales, to offer our supporters a quality discounted option. We expect this to become a very popular offering.

- And within the RMBI Care Company we are actively considering new developments in order to offer residential care where we are lacking a presence, for example, in the West Midlands and we are considering replacing existing care homes with new-builds to include assisted living, potentially in Reading and Chislehurst.

It is a fact that the age for entry into registered care is now increasingly over 90 years but through assisted living we will be responding to need and offering leasehold apartments with care for younger retired Masons.

We will also **Make a Difference**

“We are **compassionate** and **dedicated** to changing people’s lives in ways that are shown to have a **positive impact**”.

This is a key component of our new strategy and to my mind, is an area where we have made significant advances. As a modern, dynamic and forward looking charity we have a duty to ensure that our actions not

only fulfil our primary objects, but that we are providing a tangible benefit to wider society. We are doing this in several ways.

- Last year, we received 2,582 applications from charities spread across England and Wales and after due diligence and detailed consideration we awarded 453 separate grants, totalling almost £5.5M. You may be interested to know that almost all Provinces received a charity grant last year, and we are working hard to ensure that we reach the remaining few in the near future.
- I hope you will all be aware of the additional £3M awarded last year as part of our Tercentenary celebrations and the significant involvement of the general public in this initiative.
- We have established eight partnerships with Medical Research Organisations where MCF is now awarding grants for PhD studentships in research and seven emergency grants have been issued to assist those in the immediate aftermath of a natural disaster. Recent examples are the Sri Lanka floods and Hurricane Irma. What better examples can there be to demonstrate compassion and MCF having a direct impact on people's lives.
- Closer to home, a recent beneficiary survey conducted by MCF to identify how well our support services are meeting beneficiary needs, returned some very satisfactory results. We found that the

experience of enquiring and applying for support was overwhelmingly positive and adequately reflected our core values. In fact, 93% felt that the experience of applying for MCF support was a positive experience and that they were satisfied with the support they received.

- It is clear that our support is having both an immediate and lasting benefit to the applicant and their families through the reduction of anxiety, worry and distress, which is extremely gratifying and is, after all, why we exist
- Again, the Relief Chest Scheme continues to go from strength to strength. There are now in excess of 4,800 separate chests holding over £22.3M available for immediate disbursement to charitable causes, including to the Legacy charities. Last year, no fewer than 1,607 recipient charities/causes received 4,013 donations including the legacy charities and the MCF. These grants totalled a massive £10.7M.
- And in the Care Home business, over 1,000 places are now offered to Masons and their dependents. Support is being increasingly provided for dementia and end of life care and 83% of our current placements have a Masonic connection. A September 2017 'Your Care' survey of 543 RMBI residents found that 94%

were happy living in an RMBI home and 96% were satisfied with the overall standard of their home.

Finally we are **Striving for Excellence**

“We work in a **professional, collaborative** and **innovative** way to provide the best **service** to our supporters, our beneficiaries and one another”.

The size and scale of MCF, now one of the biggest charities in the UK, means that a professional approach is a necessity, not a nicety. We also have a moral responsibility to lead the way, setting an example of the highest standards for others to follow.

- There is no doubt that in coming together as one charity; we have been able to move to a fairer, more consistent eligibility criteria. We are easier to contact, have a greater awareness of what is on offer and as a consequence, more support is being provided and in a more professional manner. As we strive for greater excellence the introduction of the Visiting Volunteer Scheme has enabled us to provide a faster, more effective application process for all those in need. We now have over 400 Visiting Volunteers who, last year, made over 1,300 visits. If we have any here today, thank you for

your invaluable support. I should also mention that our Advice and Support Team remains equally busy, providing a critical service and last year alone, completed over 1,000 visits and nearly 3,000 telephone consultations, providing a listening ear and helping hand to guide the members of the Masonic community to local or national sources of help.

- Twelve Festival appeals have now launched for the MCF and there are twelve still running for the former charities. By the end of May next year, MCF festivals will be in the majority and the current average per-capita target is just under £650. Evidence that the collaborative approach between the MCF and Provinces in supporting Festivals is paying off.
- We are looking at improving our fundraising support service taking into account feedback from our Charity Steward's Conference in November. The revised and reformatted Charity Stewards Guide was distributed to all Provinces in December and was well received. We are also currently exploring ways of enhancing and improving our Festival support service, taking into account feedback received at our Festival Forum in October. I know that some of you here today were present at these meetings and I thank you for your very helpful input. Fundraising is a professional business and we need to support our fundraisers as much as

possible. You may be interested to know that last year, our voluntary income increased by 17% to £18.8M. Festival income increased by 6% and legacies more than doubled. By working in close collaboration with our key stakeholders to improve our financial base we will be able to deliver the best service to all concerned.

- With our developing support and services in mind we have also established and led a Provincial Grand Almoner Advisory Group which has produced a new Almoners' Guide and a range of fact sheets to provide Almoners with the best possible resources to help them support Lodge Members and their families. These are proving very popular.
- I should say that our communication strategy is not just about seeking those that we can support. Since our launch we have secured 875 newspaper articles across 505 publications with a reach of 10.2 million. We have also secured 130 local radio broadcasts and one national broadcast with a potential audience of 22 million. In addition, we have seen a huge increase in social media and website activity with 273,000 watching our latest videos. This is making a significant contribution towards embedding MCF in the consciousness of Freemasons and

Freemasonry into the consciousness of wider society, one of our stated aims.

- Once again the Relief Chest Scheme remains at the cutting edge of technology and we will continue to develop and provide the best possible services to our supporters and ultimately to those that we support. The scheme has deployed six critical projects in the last 12 months, designed to improve performance, ensure greater security, better meet the requirements of the regulators, speed up the processing of donations, and of course increase the reclamation of Gift Aid Tax Relief which last year amounted to over £1M.
- 15 of our Care Homes are now rated as **Good** by the Regulators, placing the RMBI Care Co in the upper quartile of care providers. We are hopeful that in the next few weeks, additional **Good** ratings will be achieved at our home in Leicester and, more locally, at our home nearby in Watford.
- Possibly one of the key markers of success and a demonstration of excellence is the value for money that we offer our stakeholders, particularly our donors and I am pleased to report that our support to beneficiaries as a percentage of total expenditure rose from 82.5% to 85.2% over the last 12 months, showing that we are

delivering value for money and this is something we will strive to improve.

- Our investment income over the same period increased by 3% to £5.52M and in order to maximise the return from our legacy funds and strip investment management fees to a bare minimum, we are about to launch our own MCF Unit Trust. This is a strategic investment fund, which will enable the charity to take maximum advantage of future investment opportunities and enable us to reduce the total expense ratio for Investment management to about ½%.

Ladies and Brethren, before I conclude I would like to mention that over the last two years we have been working closely with UGLE and the Provinces in gathering accurate information on the totality of giving across the English constitution. The findings are quite staggering. Last year, the total figure is estimated to be £46M, an increase from £33M in 2016. This is distributed evenly between Masonic (50%) and non-Masonic (50%) and is a very good reason for every Freemason to feel proud of the achievements of the MCF and what they have each contributed to charity more generally.

Last year Freemasonry celebrated its Tercentenary and although the MCF is only a little over two years old, we have already made

significant progress in securing the future of Masonic charity for the next three hundred years.

Thank you for listening.

Les Hutchinson
Chief Operating Officer