

MEMBERS' UPDATE – SUMMER 2019

This note provides an update for MCF Members following the cancellation of the members' meeting that was due to take place on 22 June 2019 at the Sindlesham Masonic Centre, Berkshire. At the meeting, three main presentations by the MCF and RMBI leadership were planned. The following is a summary of the presentations.

The MCF and freemasonry

David Innes, Chief Executive

Freemasonry is adopting a new strategic approach to secure its future. The President of the Board of General Purpose (Geoffrey Dearing) and the Grand Secretary (David Staples) are driving this approach with a remit to modernise the way freemasonry is administered, and to improve the way it is perceived both internally and externally.

The MCF needs to be mindful of this new strategic approach and ensure that its activities are complimentary.

The two key elements of this new strategic approach are:

- The recruitment and retention of freemasons.
- To normalise freemasonry within the public consciousness.

What does this mean for the MCF?

On recruitment and retention:

- As the single most important objective of UGLE, members and memberships are likely to be the top priority for provincial/metropolitan grand masters and worshipful masters.
- The MCF must be conscious that recruitment and retention will be at the heart of most provincial initiatives.
- PGMs are taking a much closer interest in charitable donations at a provincial and local level, whether they are provincial and lodge grants or MCF grants.
- Freemasonry and masonic charity need to be closely aligned and it is the responsibility of the MCF to align itself with freemasonry, not the other way round.
- To do this we need to know the causes that are important to freemasons and help provinces to achieve their strategic objectives through our grant-making.
- It is important to remember that the MCF operates at three levels: national (UGLE), provincial and local (lodges), and that funding comes from each of these levels (the annual contribution, festivals and lodge donations).



- The MCF only has a small influence on the annual contribution and limited direct communication with individual freemasons. Furthermore, our involvement in lodge collections is restricted to when the Relief Chest Scheme is used. Festivals are the principle means through which the MCF connects with individual freemasons and their families.

On 'normalise freemasonry within the public consciousness'

- UGLE has commissioned a major piece of research to understand the public perception of freemasonry. The research analysed public opinions regarding the purpose, activities and language of freemasonry, and made a number of recommendations.
- A strategic communications plan is under development and will be delivered by UGLE's newly appointed Director of Communication and Marketing.
- It is vital that a common communications approach is adopted throughout freemasonry by UGLE, Met, provinces, lodges and the MCF, as well as all other organisations within freemasonry.
- The above cannot be solved by communications alone although the MCF communications team will have a very big role to play in supporting UGLE.
- Equally, if not more importantly, is the manner in which the MCF delivers its charitable activities in support of freemasons, their families and the wider community.

An important part of this message will be the fact that freemasonry collectively provides in excess of £45m every year in charitable grants and practical support, and about half of this goes to non-masonic causes.

In conclusion, the MCF will be fine tuning its activities over the coming months to ensure it provides the maximum possible support to the new strategic approach.

Operational update

Les Hutchinson, Chief Operating Officer

The following is a summary of a 10-minute speech, prepared specifically for the Members' Meeting.

Supporting freemasons and their families

- Our work is a collaboration between the MCF head offices in London and freemasons across London and the provinces. Without the support of the wider masonic community, our work would not be possible.
- Since forming in April 2016, we have received over 25,700 enquiries for support and have gone on to help over 7,250 freemasons and their families who have a financial, health, family or care-related need, at a cost of £34.8 million.
 - The area which has generated the most amount of grants is financial support for daily living expenses.
 - Our family grants are slowly declining. This may be because the children and grandchildren of freemasons are, naturally, growing up, however, not content with a reactive approach, our communications team are thinking of proactive ways in which they can better reach these potential applicants.
- Our Visiting Volunteers are now active within the Metropolitan Grand Lodge and every province, with over 400 volunteers visiting applicants at home to make sure the necessary information is collected in order to complete an application.
- We have now released six issues of our *Better Lives* magazine, with the seventh issue currently in planning. Over the three years, circulation of the magazine has risen to over 90,000 – largely thanks to metropolitan and provincial grand almoners and their lodge almoners ensuring that every member and their families receive a copy, free of charge.
- Our strategy team has recently conducted two surveys in order to better inform our future work; a needs analysis survey and a beneficiary survey.
 - The first survey is looking into the needs of the masonic community and will help to shape the support and services we offer in the future.
 - The second is the annual survey of those we have supported within the masonic community, to better understand the difference that our grants have made to individuals and their families. (The results of the 2018 beneficiary survey showed that 96% were satisfied with the amount of support they received, and 71% reported a positive impact on someone other than themselves.)
- The results of these surveys will be reported at the next members' meeting in December.

Supporting charities – national impact, delivered locally

- Since launching, we have received 6,583 separate applications from charities seeking our support. We have gone on to award over 1,414 grants worth £21 million



- to charities that operate in local communities across England and Wales; this is in addition to the 300 charities supported with £3 million from the Community Awards.
- We are pleased that our grants have seen us support charities in London and almost every province; this is in addition to our funding for 19 medical research projects and our small grants to support the core costs of 246 hospices.
- We are now into our second year of partnerships with Age UK and Hospice UK, both of which are proving incredibly successful.
 - Age UK's Later Life Goals – a project we have funded in 13 areas and which is dedicated to reducing loneliness and social isolation – has so far supported 1,437 older people, who were all facing a major life event.
 - Through our partnership with Hospice UK, we are starting to see the difference our funding is having for bereavement support services; so far, we have supported such services at 17 hospices across England and Wales.
- Many of you will have heard of the Teddies for Loving Care appeal (TLC) that was started in Essex in 2001 – a national programme that's locally delivered by freemasons and which gives teddies to young children attending A&E units in England and Wales.

After 18 years, its founder has passed responsibility for administrating the national elements of the programme to the MCF to continue its brilliant legacy.
- In terms of publicising our support, we have worked with London and the provinces to achieve 1,130 separate news articles focussing on our charitable work in local publications and sector press, as well as 188 local radio and TV broadcasts with a combined audience of 30 million.

Raising the funds

- There are 16 provinces in festival for the MCF, with four launching this year. The average per capita raised has risen to £680 – an extraordinary figure, and one which must in part be credited to provincial grand charity stewards and festival directors. They really are doing a fantastic job in spurring on their members to donate, which in turn enables our work to continue.
- Our legacy income is continuing to grow and last year exceeded our forecast of £2.2m by over £100,000. Legacies have now reached an average of £15,803 per gift.
- The Relief Chest Scheme has also gone from strength to strength over the last three years. There are now 4,917 active chests, with an average of 50,955 donations made into the Relief Chest every month, 79% of which attracts Gift Aid.

A values-led charity for freemasonry

- Earlier this year we formally launched our values: 'Striving for excellence', 'Responsive to need' and 'Making a difference'. For those who have recently been into the MCF offices, you will have noticed that our walls have been decorated with visual reminders of these values. We have also set up an 'Above and Beyond' peer-to-peer recognition scheme, where anyone can nominate a member of staff if they feel someone has particularly demonstrated a value.



Masonic
Charitable Foundation

- Our work in the masonic community and in wider society is developing and expanding to make sure we stay up-to-date, relevant and necessary to society as a whole, and our values help us to do this in a streamlined and cohesive way.
- Everything we do and every decision we make has freemasonry at its core; thank you to our members for all of your support and encouragement. Our work would not be possible without you.

RMBI Care Company

Sir Paul Williams OBE, Chairman & Mark LLoyd, Managing Director

The following is the summary of a presentation of the RMBI's corporate strategy and development plans, the full set of slides can be found on the Members' page of the website: www.mfc.org.uk/members

RMBI facts and figures

- 170 Years in the delivery of care;
 - 1,121 registered care placements across 18 sites;
 - 1,500 well trained and qualified staff;
 - 600 new resident placements annually;
 - 90 average age of admission;
 - 48 residents over 100 years of age
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- **The RMBI's Corporate plan** documents a clear direction in development and transformation of the business, building on strong regulatory ratings and quality achievements. It diversifies the portfolio with entry in the retirement living market as a commercial venture alongside the core business of care home provision. The plan moves the charity into strong revenue outcomes and increasing profitability alongside continued core funding support from our parent, the MCF.
 - **The RMBI has regulatory strength** with a 94.4% compliance rating, placing us in the top 1% of providers. Two of our Homes are rated 'Outstanding' by CQC (a rating achieved by only 2% of care homes). A further 15 Homes are rated 'good' or 'compliant' under the English and Welsh regulatory systems.
 - **We're winning national awards and recognition** including 'Top marks' in the national 'Your Care Rating' survey with 95% resident satisfaction. In addition, the 'Top Care Home Awards' rated RMBI a top 20 medium-sized provider based on customer recommendations, and the cross sector 'Human Resources Excellence' Awards shortlisted the RMBI for its 'development and learning' culture and delivery.
 - **We have reviewed our portfolio** and identified that six of our homes – one-third of our sites – require replacement:
 - Lord Harris Court, Sindlesham
 - Prince George Duke of Kent Court, Chislehurst
 - Cornwallis Court, Bury St Edmunds
 - Devonshire Court, Leicester
 - The Tithebarn, Liverpool
 - Ecclesholme, Manchester
 - **The RMBI has recognised an emerging market for younger retirees** within Retirement Living Communities and an increasing demand for specialist end of life registered care. A 20 year forecast model has been developed to accommodate a new build programme, investment in the existing stock, and to generate improved

revenues and surplus funds providing a platform for further new developments in the future. This new model will increase the RMBI Care Co. offering to a wider demographic by providing a more diverse range of care and support.

- **Retirement living is an underdeveloped market in the UK** unlike the USA, New Zealand and Australia. Retirement living is comprised of self-contained Homes with 24 hour on site support with the option of domiciliary care. Homes are provided on a leasehold, shared ownership or rental basis. Sites generally contain 60-250 units and include a range of facilities including restaurants or cafés alongside leisure and wellness facilities including gyms, hairdressers, activity rooms, resident lounges and gardens. The ARCO UK Trade Association provides a regulated framework.
- **Our strategic objectives will deliver a mixed portfolio** of care homes focused on 'end of life care' coupled with around 250 retirement living apartments, many within a number of new retirement 'villages' which will include leisure facilities, a choice of dining and entertainment options. We will offer low and high level care within the two models of delivery. This approach should strengthen our year-on-year financial performance based on the leasehold offer and cost effective new care homes. The first of these will be at Lord Harris Court in Sindlesham, Surrey.

Lord Harris Court redevelopment



In summary our plans will deliver a sensible transformation for the business. We will maintain our core portfolio whilst developing new services with a moderate level of borrowing, matched with funding from RMBI Care Co reserves. Continued financial support from the MCF will address local authority short fall in funding fees, and commercial leaseholds in our new developments will maximise surplus and returns to support our charitable activities.