

# Your MCF briefing

## November 2019



### Chief Executive and Chief Operating Officer

- Following the results from the **second staff survey**, three sessions were held in early October to **explore the feedback and identify ways of improving** working practices and staff support. This process continued with a successful Staff Forum held in November and a number of proposals are now being implemented.
- The remaining **MCF summer holidays concluded with gala dinners** in Eastbourne and Westcliffe-on-Sea. Once again, both were well attended and enjoyed by all.
- The **2025 Dorset Festival Appeal** was launched at Sherborne School in September. In the same month, **West Kent held a pre-launch for their 2026 Festival** at an event attended by over 100 charity stewards. The formal launch will be held at a black tie event on 7 February 2020.
- At the end of October, **Suffolk and Shropshire's festivals both concluded** with successful and enjoyable events. The 2019 Shropshire Festival Appeal returned the **second-highest per capita total on record**.
- Also in October, the biannual **Charity Stewards' Conference was held in Nottingham**. Almost all provinces were represented and the conference was one of the most successful held to date.
- An impressive Vision Document outlining **proposals for Compass Park** was presented to **Hertsmere Borough Council Planning Panel** at the end of October. This appears to have been well received and further discussions are ongoing.
- Arrangements for the **2020 MCF Ball** have now been finalised and it will be held at the **Chelsea Harbour Hotel on Saturday 20 June**. Guest cabaret will be the legendary **Status Quo**. The Ball is being hosted by the Province of Surrey and is expected to sell out very quickly.



### Admin and Support

So far this year, the administration team has processed **over 2,500 applications and review forms** within required deadlines. If this trend continues, it is likely that the team will process around **3,000 applications by December 2019**.

The administration team attended the **Provincial and Metropolitan Grand Charity Stewards' Conference** in October to support with greeting delegates and other logistical duties. The team has also provided support to the Masonic Support department by populating a database with information from GAMES. This will help determine accurate grant processing times.



## Masonic Support

### Enquiries

In the last six months, the Masonic Support team has handled **7,677 enquiries** for support. Each enquirer was either given advice about the help available, offered immediate support, supported in starting the application process with the MCF, or referred back to provinces and other charities that might be able to assist.

### Grants

In the last six months, the team has awarded **3,213 grants to 2,195 beneficiaries**. These grants **totalled £6,795,345**.

### Advice & Support

In the last six months, the Advice & Support Team has completed **1,338 commissions for advice and support**, including benefits checks, help with making an application to the MCF and signposting to other sources of support.

### GAMES

A significant deployment as part of the **GAMES 2.0 project went live on 1 November** as part of a major update for the IT system. As this update is rolled out, it will automate a significant number of grant reviews, reducing the administration required from the team. The project is near to completion.

### Teddies for Loving Care (TLC)

Forums have been held across the country and have been well recieved, with good support for the **new branding and proposed bear design**. TLC representatives have welcomed the opportunity to meet with their peers and are supportive of the assistance being provided by the MCF.

### Mental health

October saw the first meeting of a **new working group to review our mental health support offering** with input from our new Specialist Medical Advisor, Deenesh Khoosal, an experienced psychiatrist.

### Provincial support

Our Provincial Engagement Officer has regular sessions in his diary in the run up to Christmas to attend almoner training days, all aimed at supporting PGAs in engaging their almoner teams.





## Charity Grants

### Interaction between the MCF and the provinces

Three initiatives have been proposed to facilitate closer interaction between the MCF, the provinces, and Metropolitan Grand Lodge. They are:

- **Interaction:** Increased levels of direct involvement and consultation with provinces/MetGL in the approval process for the MCF's two main charity grants programmes.
- **Festival Grants Fund:** Supporting provinces in festival by funding charities nominated by provinces.
- **Matched Funding Scheme:** Boosting provincial giving by increasing the matched funding grant amount to £10,000 per annum which will incorporate existing air ambulance grants of £4,000 per province.

These points were presented at the Provincial and Metropolitan Grand Charity Stewards' Conference in Nottingham in October. The Charity Grants team has **begun to work on these guidelines and processes** ready for these new initiatives to be launched on **1 April 2020**.



### Small and large grant applications

- The Charity Grants team received **448 applications** for the October 2019 round.
- This represents a **6% increase** in application numbers compared to the previous round.
- The total amount requested was **£15,801,314**.
- Of these applications:
  - **465** were for the Early Years programme
  - **136** were for the Later Life programme
  - **47** straddled both programmes
  - **184** were Large Grant applications
  - **264** were Small Grant applications
  - **66%** had not previously applied for a grant from the MCF
- **69 applications were rejected as ineligible** (15%, a decrease of 1% on the last round). Of these, the most common causes were:
  - **14** did not fit the MCF's criteria for funding.
  - **14** had unrestricted reserves of over a year.
  - **13** applied too soon after their last application/grant or had an application pending.
  - **11** did not have independently examined or audited accounts, or signed accounts.
- The Charity Grants team also received **364 general enquiry emails from charities** during this round, and an **average of 25 enquiry calls per week**, doubling to 50 calls in the weeks leading up to the deadlines.

## Reducing Isolation in Later Life – examples of grants awarded



### **East Kent – Royal British Legion Industries: £135,000 over three years**

Grant to fund the salary of a welfare manager for the STEP-IN project, providing activities for older veterans.



### **Warwickshire – St Paul's Community Development Trust: £30,000 over two years**

Grant to support social gardening which will improve the physical and mental health of isolated older men in Balsall Heath, Birmingham.



### **Yorkshire, West Riding – Darts: £70,702 over three years**

Grant to fund Singing for Memory sessions for older people with dementia and their carers, providing a space for beneficiaries to have fun, sing familiar songs, and meet people.



### **Cornwall – The Oasis Centre: £5,800**

Grant for core costs. The charity runs a range of activities for isolated older and marginalised people, and has a wellbeing cafe, lunch club, memory cafe, as well as weekday drop-in sessions.

## Creating the Best Start in Life for Disadvantaged Children and Young People – examples of grants awarded



### **Bedfordshire – Bedford Open Door: £15,000 over three years**

Grant for core costs. The charity provides free and confidential counselling to young people.



### **Durham – Place2Be: £60,000 over three years**

Grant to fund counselling in schools in the North East, supporting positive child and adolescent mental health.



### **Devonshire – Exeter Royal Academy for Deaf Education: £28,380**

Grant to equip a multi-sensory room for students with multi-sensory impairments to help stimulate their senses, encouraging them to get active and engage.



### **Hertfordshire – CHEXS: £15,000 over three years**

Grant for core costs. The charity delivers a self-esteem programme for children and young people and provide support for their families.

## Age UK partnership

The MCF has received a quarter four report for the Later Life Goals project from Age UK. During the **three months of activity to 30 September**:

- **856 older people have been supported**, taking the total number for the year to date to 3,234. This is **slightly below the annual target of 3,250**.
- The total amount of unclaimed benefits, reductions, and payments identified have risen to a **staggering £5,772,975**, averaging an extra **£4,023 for each beneficiary supported each year**.
- **81% of beneficiaries have had a home visit**, with 691 home visits taking place during the quarter, taking the annual figure to 2,614 and **surpassing the annual target of 1,300**.
- Later Life Goals Advisers have asked the UCLA Loneliness Scale Questions to 670 beneficiaries, taking the year to date total to 2,662; representing 82% of all beneficiaries.

## Home-Start partnership

The ten provinces for the first year of the Home-Start UK partnership have been invited to participate. We hope to reveal the provinces being supported by the **beginning of December**.



## Hospice grants

**218 hospices** across England and Wales received core **grants totalling £300,000**.

## Hospice UK partnership

The Charity Grants Committee approved the next theme of funding for the coming year which will centre on **'Widening Access for Hospice Care for People with Learning Disabilities and/or those Experiencing Homelessness'**. Applications for this funding opened at the beginning of November and will close on Monday **27 January 2020**.



## Matched funding grants

**Four provinces** received matched funding grants to boost their local giving. These were:

- Province of Devonshire
- Province of Suffolk
- Province of Warwickshire
- Province of Wiltshire

## Emergency grants

- **Flooding in Lincolnshire (June) – £25,000** to Lincolnshire via The New Provincial Benevolent Fund towards the provincial response.
- **Flooding in Yorkshire (August) – £15,000** to the Two Ridings Community Fund to support both the Province of Yorkshire, West Riding and Yorkshire, North & East Ridings' provincial responses.
- **Hurricane Dorian (August) – £20,000** to UNICEF towards relief efforts in the wake of Hurricane Dorian, with an offer of a further £20,000 to the District Grand Lodge of Bahamas and Turks subject to receiving confirmation of how the funds will be used. A Relief Chest has also been opened to raise additional funds.
- **Flooding in Bangladesh (September) – £20,000** to Plan International UK towards flood relief efforts.
- **Earthquakes in Colobato Region of the Philippines (November) – £15,000** to Plan International UK towards relief efforts.
- **Flooding in Yorkshire (November) – £20,000** to the South Yorkshire Community Foundation to support those in the Province of Yorkshire, West Riding affected by the floods.
- **Flooding in Derbyshire (November) – £10,000** to the Derbyshire Community Foundation to support those in the Province of Derbyshire affected by the floods.
- **Flooding in Nottinghamshire (November) – £7,500** to the Nottinghamshire Community Foundation to support those in the Province of Nottinghamshire affected by the floods.

## Charity Grants database

Salesforce, the Charity Grants database, has been **live for just over a year** and two grant rounds have successfully been processed using this system. There are **plans to include the new festival grants programme** in the database in time for the rollout in April, and to incorporate the **core hospice grants programme** for the next round in 2020.





### News and media

In the last three months, **57 news stories** about the RMBI Care Co. have been featured in the media. News coverage includes **32 online** and **25 print** articles in key regional titles and care publications.

### Impact Report 2018-19

RMBI Care Co.'s **2018-19 Impact Report is now available**, providing an update of the care and support the RMBI Care Co. has provided to Freemasons and their families over the last year.

### RMBI News – Autumn/Winter 2019

The **latest edition of RMBI News is now available**. Find out how staff at Connaught Court in York are helping a resident to fulfil his dream to fly in a hot air balloon over Yorkshire and how a resident at James Terry Court in Croydon has received the Freedom of the City of London.



Read more at: [www.rmbi.org.uk/media/rmbi-news-magazine](http://www.rmbi.org.uk/media/rmbi-news-magazine)



### Fundraising and Legacies

Alison Lott is retiring from her position as Fundraising Manager after 28 years with the Masonic Samaritan Fund and the MCF.

### Charity Stewards' Conference 2019

- The **Metropolitan and Provincial Grand Charity Stewards' Conference** took place on 15 and 16 October at the Crowne Plaza in Nottingham.
- **45 of the 48 provinces attended** (those not attending were Guernsey & Alderney, Hampshire & Isle of Wight, and Jersey).
- **40 provinces** were represented by their provincial grand charity steward.
- The feedback was extremely positive, with the **conference receiving an overall rating of 90%** and the MCF staff and administration receiving **96%**.

### Legacies

- It has been agreed that the MCF's membership of The Goodwill Partnership **will-making service is to be offered to everyone free of charge with immediate effect**.
- At the end of October 2019, reported **legacy income stood at £1.8 million** which is ahead of the forecasted budget figure.
- In September, the MCF received its **largest legacy donation to date**. Bro. David Walton (Essex) left the residue of his estate to the MCF. The legacy was worth £247,291.



Bro. David Walton



### Financial summary for the seven months ended 31 October 2019



**£7.75 million in income**

- Unit donations £3.1 million
- Regular donations £1.96 million
- Gift Aid envelopes £1.48 million
- Gift Aid tax relief £640,000
- Other £570,000



**£6.61 million in grants to charities**

- £3.03 million for the MCF
- £2.07 million for legacy charities
- £1.51 million for other charitable organisations

**121**

Relief Chests  
opened

**4,973**

Number of  
Relief Chests



**Average number of monthly donations into the Scheme:  
61,496**



**Average number of monthly tax reclaims:  
49,367**



**Average number of monthly payments from the Scheme:  
335**

# Festival update

## Festival launches

**Monmouthshire 2024**

Launched 28 February 2019

**Cornwall 2024**

Launched 23 March 2019

**East Kent 2025**

Launched 12 April 2019

**Derbyshire 2025**

Launched 13 April 2019

**Dorset 2025**

Launched 29 October 2019

## 2019 festival finales

**Bristol**

Gala Ball held on 12 April 2019 at Ashton Gate Stadium

Total raised: £1,053,206

Per capita: £829

**Surrey**

Gala Dinner held on 11 May 2019 at Guildford Cathedral

Total raised: £ 3,313,470

Per capita: £532

**Hertfordshire**

Gala Dinner held on 6 July 2019 at Guidhall, London

Total raised: £3,632,368

Per capita: £681

**Suffolk**

Gala Dinner held on 23 October 2019 at Royal Hospital School, Holbrook

Total raised: £1,585,657

Per Capita: £581

**Shropshire**

Gala Dinner held on 26 October 2019 at Telford International Centre

Total raised: £1,217,094

Per Capita: £982

	2020	2021	2022	2023	2024	2025
Province	Somerset	Buckinghamshire	Essex	Berkshire	Cornwall	Derbyshire
Members	3,369	2,911	8,492	2,642	2793	2,613
Province	Middlesex	Durham	Leics & Rutland	Cambridgeshire	Monmouthshire	East Kent
Members	4,110	5,111	2,792	1,387	1107	5,641
Province	Northumberland	South Wales	Oxfordshire	Devonshire	Northants & Hunts	
Members	3,507	5,417	1,697	4,814	3,150	Upcoming
Province	Herefordshire	West Lancashire	Worcestershire	Warwickshire	Staffordshire	Dorset
Members	566	8,012	2,437	3,520	2,341	Lincolnshire

Details of festival achievement must not be disclosed to any third party without prior reference to the Chief Executive or Chief Operating Officer. Income to date only includes money received and does not include promises or money still held by the province. Figures above correct as at 30 September 2019.





## Impact Report

The MCF's **2018-19 Impact Report** has now been **finalised**. The Report has been designed and printed in the form of a **newspaper called *Better Times***, highlighting the improvement that the MCF makes to the lives of the people it supports. The report reveals that the MCF provided **£18 million** of support to Freemasons, their families and the wider community during 2018-19, with grants paid to over **3,000 people** and **500 charities**. A **supporting website and poster**, with localised information, have also been produced.



## Better Lives: Issue 7

The **seventh edition of *Better Lives*** has been distributed to almoners and subscribers. This edition focusses on the increasingly important topic of **mental health and wellbeing**. The magazine features **stories from Freemasons** who have been supported through periods of mental ill-health by the MCF, as well as providing **practical advice** and guidance for those who may be at risk.

## Charity Lodge Room

Lodge Room 16 at Freemasons' Hall, London is to be decorated with a **series of murals depicting the history of masonic charity**. The murals show the origins of the MCF's predecessor charities and the changes that were made to them over the years. In addition, an **honours board will be installed in the ante-room** to commemorate those lodges that achieve the rank of Grand Patron in their support for the MCF.



## Freemasonry Today

Look out for some familiar faces in the upcoming edition of *Freemasonry Today*. The December edition of the magazine includes an article about the '**Freemasons of the MCF**' who work across many departments of the charity and at various levels of seniority. Together, they provide an important link between the Craft and the wider staff team.



## Strategy and Special Projects

### Grants policy

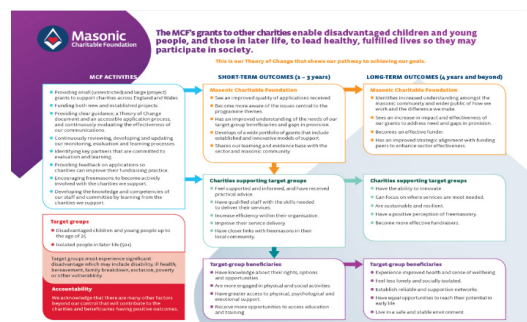
The **Masonic Support Committee** recently considered **changes to the TalentAid programme** and also how we offer support for the additional costs of secondary school education. **No immediate changes to these areas were agreed** at this stage and more work will be undertaken to consider how we can administer these grants more efficiently in the future.

### Theory of Change

Work has started to design a **Theory of Change** and **measurement framework** for our **Masonic Support programme**.

### Mid-year corporate plan review

Our review has found that whilst fewer than half of the activities we set ourselves for the first six months of the year have been completed, many of these activities are **due to be completed in Q3** so there is no cause for concern at this stage. The **process to draft our corporate plan for 2020/21** will begin shortly.



## Finance

### WebExpenses

Our new **paperless expenses management system**, 'WebExpenses' completed its pilot phase in October. After reviewing the pilot phase, a few adjustments were made and it has now been **implemented across the MCF and RMBICC staff and trustees**.

### RMIGET

The **Royal Masonic Institute for Girls Endowment Trust (RMIGET)** is now fully integrated into **MCF finance**. The statutory accounts for the 15 months ending 31st March 2019 will be presented to the December MCF Board of Trustees for approval.

### CCLA

Fund manager **CCLA** has been appointed to replace **Fulcrum** within the **MCF CAIF**.

### Budget

The **2020/21 budgeting process** is now underway.

### Lunch and Learn

The finance team held their 'Lunch and Learn' session on 14 November 2019. MCF staff attended a **presentation followed by a Q&A session** designed to shed light on the work of the team and how they fit in to the wider MCF structure.





## Human Resources

### New staff

We have welcomed the following new members of staff:

- Faduma Dualeh, Liz Giaretta, Rowena Kashay and Emma Perry as Grants Officers
- Gill Valentine as AST Team Leader and Designated Safeguarding Officer
- Anisha Mandalia as Enquiries Officer

### Internal promotions and changes

- Annaliese Farnsworth has been promoted to Administration Team Leader
- Anna Wilson has been promoted to Marketing Executive
- Paul Crockett will take over from Alison Lott as Fundraising Manager from 1 December

### We have said farewell and thank you to:

- Jo Griffin, Facilities Officer
- Maggie Holloway, Advice & Support Team Manager
- Julia Young, Senior Advice & Support Team Advisor
- Suzanne Wright, Grants Officer
- Alex Thomas, Grants Officer
- Hannah Lester, Deputy Donations Manager
- Harry Nielson, Grants Officer
- Olivia Oancea, Marketing Executive

### Employee engagement initiatives

- **Feedback sessions** on the results of the employee engagement survey were held on 9 October. **Staff shared information and discussed action plans.**
- Training was delivered to all newly-appointed staff representatives ahead of the **Staff Forum on 6 November**. The staff representatives provided the executive with a number of suggestions and ideas, and these are being considered.
- **Wellbeing programmes are currently being enhanced** and a new **Employee Assistance Programme and Hapi App** platform is currently being built by an external supplier and will be **launched before Christmas**. This will provide staff with access to many resources linked to enhancing wellbeing and lifestyle as well as a **24/7 counselling line**. Medicash, our medical cash plan has also launched a mindfulness app for staff.
- Staff Christmas party invitations have been sent out and planning is ongoing.

