



UNITED GRAND LODGE  
OF ENGLAND

# THE CHARITY STEWARDS' GUIDE



This guide has been produced by United Grand Lodge of England with the assistance of the Masonic Charitable Foundation for the benefit of Metropolitan, Provincial and Lodge Charity Stewards. It is endorsed by the Grand Master's Council Charity Committee and supported by the MCF.

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## INTRODUCTION

This guide is a living online document and has been prepared to assist Charity Stewards to undertake their important role and highlights the key issues which have been known to arise. It signposts the reader to additional resources where more detailed information is explored on a particular topic.

Fundraising is a professional activity which is governed by the Fundraising Regulator and a Fundraising Code of Practice. Our main strategic partner is the Masonic Charitable Foundation which is the Freemason's Charity. The MCF is signed up to the Regulator and operates within the Code of Practice. This allows the MCF to work with UGLE to provide guidance and support through this guide to Metropolitan and Provincial Grand Charity Stewards which is relevant and compliant.

By their very nature, Freemasons have a charitable disposition and so it is hardly surprising that kindness and charitable giving are deeply ingrained within the principles of Freemasonry. They form the characteristics of a Freemason's heart and give us all a great sense of pride and satisfaction.

Our charitable activities are wide reaching and of importance, extending across the whole globe with financial and practical support through the voluntary giving of time. They are also responsive. Our reaction to the Covid-19 pandemic, supporting local communities, was of significant importance when so many charities were struggling to maintain their fundraising income. We have seen remarkable stories from across the country of how our members are coming together – from helping to raise vital funds for the NHS and delivering food to the community, through to purchasing ambulances and manufacturing vital personal protective equipment (PPE).

UGLE provides a robust support structure that helps members make positive contributions to communities and worthwhile causes through fundraising events or volunteer work. The MCF co-ordinates the main bulk of our financial contributions and enables us to respond quickly in times of emergency. The latest figures show that in the course of a year the MCF provides nearly £20m to support Freemasons, their families and local communities through nearly 7,000 grants.

Charitable giving is a golden thread which runs through individual members, lodges and Provinces complementing our central support. Thus, through a variety of Provincial and local charitable arrangements we are able to make a real difference and an important contribution at local, national and global levels by giving time, practical support and financial support. Many wide-ranging examples can be found on the UGLE website at <https://www.ugle.org.uk/charity/freemasons-helping-their-communities>

Much of the fundraising that takes place to support the MCF is achieved through festival appeals. Outside of the festival system, Freemasons are pleased to support external national charities directly such as The Freemasons Fund for Surgical Research which was set up by donations raised from Freemasons as part of the 250th Anniversary of the United Grand Lodge of England and supplemented with a second significant sum by Supreme Grand Chapter in order to mark the 200th anniversary of the establishment of the Royal Arch. Freemasonry has had a long relationship with the Royal College of Surgeons by funding Research Fellowships and the College has made presentations at Grand Lodge on a number of occasions as well as at Provincial Grand Lodges and private Lodges. (Visit <https://www.ffsr.uk/>)

Other charities that receive support through our fundraising efforts include the Teddies for Loving Care Appeal (TLC), The Masonic Fishing Charity and Lifelites. A hospital visit can be a frightening experience for a young child, especially in an emergency situation. TLC provides much-needed comfort to children in A&E departments, helping to reduce the shock and distress of their experience through the gift of a cuddly teddy that they get to take home with them. (Visit <https://teddiesforlovingcare.org.uk/>)

The Masonic Fishing Charity aims to bring an interactive fishing and countryside experience to people with special needs. It achieves this by running fishing events, both coarse and fly, at various fisheries and inviting participants from special needs schools and centres and people who have suffered trauma to come and join in. (Visit <https://mtsfc.org.uk/>)

Lifelites is a charity which gives life-limited and disabled children using hospice services across the British Isles the opportunities they wouldn't otherwise have, through the magic of assistive technology. Over 10,000 children at every baby and children's hospice across the British Isles are supported by Lifelites. (Visit <https://www.lifelites.org/>)

It will come as no surprise that through a combination of all of their contributions, Freemasons are recognised collectively as one of the largest charitable givers in the country, contributing more than £42 million to deserving causes in 2019 alone as well as over 18.5 million hours of volunteer work.

Giving time by volunteering for charitable enterprises is as important to Freemasons as donating money. The scope of our volunteering is wide ranging and immense. Everywhere one looks Freemasons can be found beavering away behind the scenes and making a difference to local communities and individuals. In response to the pandemic Freemasons have been quick to volunteer to help run vaccination and testing centres as well as making vital deliveries. Equally Provinces have thrown their weight behind these ventures by offering resources and spare capacity in their masonic centres. (Visit <https://www.freemasonrytoday.com/ugle-sgc/ugle/freemasons-invited-to-volunteer-for-vaccination-drive>)

Being able to respond quickly to changing environments is vital when it comes to charity and fundraising. In 2020 the Covid-19 pandemic created huge challenges for fundraising and many charities struggled to cope with a reduction of income coupled with an increase in demand on their services. Due to the responsive and generous nature of Freemasons and the co-ordinated efforts of UGLE, The MCF and Provinces, the Freemasons' COVID-19 Community Fund was able to allocate £1m to Regional Communications Groups for distribution externally to support such ventures from the provision of PPE in various local healthcare settings in the community to supporting women's refuges.

In addition to this, Freemasons raised a further £1M matched by £1M from the MCF which will be used to support the homeless, carers and other causes that were directly affected by the pandemic.

This response to charity and fundraising can only be achieved through the efforts, dedication and knowledge of our Charity Stewards. This guide provides the necessary assistance, guidance and background information that will enable you to undertake your duties to the full, work effectively with Almoners, identify charitable causes to support and manage fundraising appeals, including festivals in support of the MCF. The guide walks you through compliance with regulations, how to create effective communications and how to build relationships with your local communities through your charitable activities.

## THE CHARITY STEWARD'S GUIDE

As a living document, you will see regular updates to keep you up to date and informed with all the latest information and resources that you need to fulfil your important tasks to best effect and point you in the direction of further support.

# 1. THE ROLE OF THE METROPOLITAN AND PROVINCIAL GRAND CHARITY STEWARD

Kindness and charitable giving are deeply ingrained within the principles of Freemasonry. The organisation provides a support structure that helps members make positive contributions to communities and worthwhile causes through fundraising events or volunteer work.

The role of a Metropolitan/Provincial Grand Charity Steward (Met/ProvGChStwd) is both rewarding and challenging in equal measure. Whilst there are core common components, the role varies from one Province to another depending upon the make-up of that Province and the priorities and challenges that the Provincial Grand Master has identified to ensure success for his Lodges and members. To be successful requires energy, expertise and certain skills that you will need to utilise in their fullest measure. The core components of the role and responsibilities include:

## CORE ROLE

- To work with the Metropolitan/Provincial Executive on agreeing and implementing strategy on fund raising and the distribution of funds including the use of charity for community engagement and publicity.
- To oversee and encourage brethren in all matters relating to charity within your Province.
- To be responsible for the management and discharge of the Provincial Charity Strategy.
- To manage all requests received within your Province for charitable aid.

## CORE RESPONSIBILITY

- To assist the Metropolitan/Provincial Grand Master and to provide regular updates to his Executive Team on charitable work.
- To liaise with and enthuse Lodge Charity Stewards throughout your Province thereby enabling them to motivate and to encourage their members to give time and effort.

- To share ideas and to offer advice to Lodge Charity Stewards on best practice for fundraising, holding charity funds, maintaining records and the distribution of funds.
- To promote and assist lodges with the setting up and the use of Relief Chests managed by MCF.
- To provide appropriate training and support for Lodge Charity Stewards.
- To recognise and champion outstanding efforts by Charity Stewards and Lodges.
- In conjunction with your PCO to communicate information and appropriate charitable news throughout your Province.
- To disburse authorised funds and maximise the impact through liaison with the Metropolitan/Provincial Communications Officer and Communications team.
- To apply due diligence to, and report back on charitable grant applications received from both masonic and non-masonic organisations.
- To act as a link between UGLE and MCF for charitable purposes.
- To promote the charitable work of UGLE, MCF, Metropolitan/Province, Lodge and members.
- To sit on community funding panels as required.
- To organise and facilitate special charity events.
- When in Festival.
  - To be a lead member of the Festival Committee.
  - To maintain communication with the MCF throughout the Festival period.
  - To assist with establishing the Provincial Strategy regarding the targets.
  - To monitor and report regularly on the progress of the Festival.
  - To build relationships with your counterparts in your RCG and/or neighbouring Provinces will also be beneficial.

The above list is not exhaustive and the items are covered in more detail in other sections of this guide. One of your most important duties is to build positive relationships; with members of the Metropolitan/Provincial Executive, with Charity Stewards and of course with members. This should be done in a caring and sensitive way so that you can encourage all forms of charitable activity including fundraising and charitable giving to support both Masonic and non-Masonic causes.

Whilst as Freemasons, our aims are very similar, priorities both vary considerably between Lodges and depend on whether or not a Province is in Festival. Adaptability is one of the key

attributes required to ensure that our charitable aims are undertaken in a positive and professional manner and, most importantly, within the law.

When appropriate, there is no reason why you should not accept, if offered, help from other brethren and even family and friends. This can promote enthusiastic interest and support that may encourage charitable giving in its widest forms.

One of the key aspects of your role is to encourage and offer guidance to Charity Stewards on how to make donations, either by a regular or single donation or by the use of Gift Aid envelopes via MCF Relief Chests and sponsorship events.

### INDUCTION

An induction should ideally be undertaken prior to appointment, to provide a good understanding of the purpose of the role, the expectation of the office and to enable a newly appointed Met/ProvGChStwd to commence his activities prior to his appointment, thus ensuring a smooth hand over from his predecessor. The induction should clearly outline the purpose of the office and the value it can add to a Province if conducted correctly.

On behalf of and supported by UGLE, the MCF will offer induction sessions for a Met/ProvGChStwd' throughout the year. This induction will cover the following:

- Role of the Met/ProvGChStwd
- How best to support Metropolitan and Provincial Executives
- How to manage and enthuse Charity Stewards
- What information and when to communicate appropriate charitable news
- Working with the PCO, MCF & UGLE Communications teams
- Providing advice and guidance on raising and collecting funds
- Prepare and share ideas that have worked well
- Training on offering advice on how to administer funds and keeping them safe – Relief Chests
- Understanding of the grants system and what is available to use at a Metropolitan/Provincial level
- Knowing the key personnel and contacts at UGLE and MCF
- Disbursing authorised funds and maximising the impact
- A focus on enabling Charity Stewards to motivate the Brethren

- Dealing with vulnerable donors
- Fundraising regulations and best practice

## TRAINING AND SUPPORT

### *Charity Stewards Conference*

On behalf of UGLE the MCF hosts a biennial conference for the Met/ProvGChStwds. The two-day conference is a useful opportunity for delegates to receive training and support, updates and useful information from UGLE, the MCF and external organisations. It also provides a forum for discussion and ideas sharing as well as a chance to socialise with your peers from across the Provinces. The Metropolitan and all Provincial Grand Charity Stewards are invited to attend with one other representative accompanying them.

### *Festival Forum*

During the years that fall between conferences, the MCF host a Festival Forum. This one-day event is aimed at Provinces who are engaged in Festival appeals and focuses on the Festival system and related topics. The Festival Chair and one other representative is invited to attend.

### *Training workshops*

In support of UGLE, the MCF is happy to provide training workshops that will cover general or targeted aspects of your role. This may include fundraising, communications, Relief Chest and legacy giving.

### *Online resources*

There are numerous documents, leaflets and forms of guidance available to download from the MCF website. In addition there is a dedicated MCF YouTube channel, Facebook page and Twitter feed. Met/ProvGChStwds also have a closed Facebook group that they can join.



MCF Resources <https://mcf.org.uk/resources/>

Facebook @Masonic Charitable Foundation

Twitter @Masonic\_Charity

Instagram [https://www.instagram.com/masonic\\_charity/](https://www.instagram.com/masonic_charity/)

You tube <https://www.youtube.com/channel/UCMcsqIJH7w4cZ94tKhQ43w>

### ***Building a Metropolitan / Provincial Charity Team***

There are lots of reasons why having a team around you is a good idea. Among these are:

- It Boosts Productivity.
- It Provides a Support Network.
- It Encourages Innovation.
- It Improves Morale.
- It Attracts Talent.
- It Establishes Strong Relationships.
- It Allows Flexibility.

Depending on how your Province is managed you may want to consider having the following offices on your team:

- Secretary
- Treasurer
- Comms Officer
- Fundraising and engagement (could be a sub-team)
- An Events Team (for large fundraising events)

You may want to include a member of from the Met/ProvGAlm's team, (should there be one) and one or both of the MCF Members. Another benefit of having a charity team is that it may allow you to identify your successor.

## WORKING WITH THE METROPOLITAN AND PROVINCIAL GRAND ALMONER

The Met/ProvGChStwd and Met/ProvGAlm's role are somewhat interlinked and an understanding as well as a close working relationship between the two officers will certainly add value to the success of the Province. An Almoner is key to providing care to our members, their families, widows, dependants and resigned Freemasons who may be experiencing difficulties in their lives. The Met/ProvGChStwd can work closely with the Met/ProvGAlm in ensuring a consistent approach to areas which overlap their roles.

Many of the skills that a Met/ProvGAlm should possess, for example, understanding and maintaining of confidentiality and safeguarding, maintaining contact with members, being aware of the Masonic charities and how to contact them and being a good 'listener', (being

an 'active listener', rather than a passive one) are not exclusive to the Almoner and would certainly be replicated for a Charity Steward.

It is important that the Met/ProvGChStwd understands the role of the Met/ProvGAlm to be clear on each other's roles and where there is an overlap between the two. A close working relationship will benefit the Province and will also add value to each other roles and ultimately the beneficiaries of the funds raised.



MCF Almoners resources <https://mcf.org.uk/almoner/>

## WORKING WITH LODGE CHARITY STEWARDS

The Met/ProvGChStwd should operate an 'open door' policy with regard to Charity Stewards and one way of achieving this is to have a dedicated email address for the role as opposed to a personal one. The Metropolitan/Provincial Charity Steward should be seen as being there to help, direct and guide a Lodge Charity Steward as he has access to a vast resource at his disposal. He will also have a lot of fundraising ideas and will be able to direct as to what has worked well in the past and what has not, therefore potentially avoiding wasted efforts. He should have the ability to advise as to which charities have been supported in the past, guidance as how to assess if a charity is worthy of a donation by using a due diligence process, how funds can be used i.e. charitable funds and non-charitable funds. It is also important that the Lodge Charity Steward has a good working knowledge of the objectives and priorities of the Metropolitan/Provincial Executive as well as the operation of any Metropolitan/Provincial Charities.

### ***Induction Process***

A suitable induction programme should be conducted for new Charity Stewards by the Metropolitan/Provincial Charity Steward. Subject to the number of Lodges within a Province and the amount of change occurring this should be scheduled as frequently as required so that small groups can be inducted together, but there should be at least one induction programme per year. The induction process should cover the following topics as a minimum:

- UGLE and Metropolitan/Provincial charities and initiatives (TLC for example)
- The charitable objectives and priorities of the Metropolitan/Provincial Executive
- The Relief Chest Scheme

- Annual Metropolitan/Provincial Charity Returns
- Regular Payment Promises
- One-off donations
- Gift Aid Envelopes
- Raffles
- Festival system
- Legacies
- Charitable donation records
- Working within the Lodge
- Volunteering
- The MCF

### *Seminars and workshops*

Holding regular workshops and seminars are an excellent way to provide training. They provide an opportunity to keep Charity Stewards updated with latest news and developments and also enable you to build and maintain relationships throughout the Province. How often you hold these is entirely down to you, but at least once a year would be recommended. The MCF is happy to provide staff members to give presentations at these events. These seminars can cover a general range of topics, or more specific areas. For instance, you may want to provide training on using the Relief Chest Scheme and so focus a workshop solely on this subject.

### *Metropolitan/Provincial Charity Committee.*

Ensure that Charity Stewards have easy access to you and your Metropolitan/Provincial Charity Team. Your team members should be able to provide help and support in terms of administration, advice on making donations and how to get the most out of communication and publicity. Ensure that Charity Stewards across the Province have all the necessary contact details to make their role easier and more productive.

## 2. THE ROLE OF THE LODGE CHARITY STEWARD

The Role of a Lodge Charity Steward can be equally challenging but at the same time very rewarding. The main function of the Lodge Charity Steward is to:

- Oversee every aspect of charity on behalf of the Lodge and in support of the Province.
- Raise and collect funds.
- Provide guidance on making donations
- Undertake the necessary administration associated with those funds.
- Liaise with the Province's own charity (if it has one)
- Collate Lodge charity donations information for reporting purposes.
- Disburse authorised donations.
- Encourage brethren to give both time and effort.
- Identify and support both Masonic and non-Masonic charities.
- Work with local charities to encourage engagement and promote the impact of Lodge donations.

A Lodge Charity Steward should be supported in every way possible particularly when he is first appointed and he should be provided with an assurance that there is a wealth of knowledge and resources available to him either in the Lodge, at Metropolitan/Provincial level or at the Masonic Charitable Foundation.

### ADMINISTRATION

It is important that Charity Stewards manage the administrative duties of the role with clarity and transparency, whilst also ensuring that matters are dealt with in compliance with the GDPR. The Met/ProvGChStwd (and their teams) can provide practical support and advice on this. Information is also available in the MCF Charity Steward's Guide.

Items that Charity Stewards may need to include when considering the administering of the role are detail below:

- A yearly schedule of events
- Yearly Metropolitan/Provincial Charity returns
- Providing the Lodge Treasurer with figures/statements that he may need to complete the annual charity accounts of the Lodge

## THE CHARITY STEWARD'S GUIDE

- Records of Regular Payment Promises
- Individual donations
- Gift Aid Envelope stocks
- Envelope verification form
- Green & blue voucher forms
- Relief Chest statements
- Other forms
- Historical donation information
- Raffle tickets

### 3. INTRODUCTION TO THE MCF, THE FREEMASONS' CHARITY

Funded entirely through the generosity of Freemasons and their families, the Masonic Charitable Foundation (MCF) is one of the largest charities in the country and helps to improve the lives of thousands of people every year in England, Wales and overseas. It builds better lives by enabling opportunity, promoting independence and improving wellbeing for Freemasons, their families and the wider community.

Masonic charity has existed since the 18th century, providing specific types of support to Freemasons and their families. The MCF brings together the work of The Freemasons' Grand Charity, the Royal Masonic Trust for Girls and Boys, the Royal Masonic Benevolent Institution and the Masonic Samaritan Fund.

The separate charities continue to exist as funds within the MCF, but their work has now been consolidated under the MCF. The RMBI Care Co also continues to provide high-quality care services for older people. The MCF is the Freemasons' Charity.



MCF Website <https://mcf.org.uk/>

RMBI Website <https://www.rmbi.org.uk/>

#### MCF DEPARTMENTS

To enable you to carry out your role successfully it is useful to know which departments you are most likely to have contact with. Below is a list of these departments;

DEPARTMENT	CONTACT
Fundraising	Paul Crockett, Head of Fundraising <a href="mailto:fundraising@mcf.org.uk">fundraising@mcf.org.uk</a>
Communications	Mariana Mendes, Marketing Manager <a href="mailto:communications@mcf.org.uk">communications@mcf.org.uk</a>
Legacies/Wills	Duncan Washbrook, Legacy Manager <a href="mailto:legacies@mcf.org.uk">legacies@mcf.org.uk</a>
Relief Chest	Dilhani Jayasinghe, Relief Chest Manager <a href="mailto:reliefchest@mcf.org">reliefchest@mcf.org</a>
Charity Grants	Emily Swords, Grants Manager <a href="mailto:charitygrants@mcf.org">charitygrants@mcf.org</a>

## 4. FUNDRAISING

As a Charity Steward raising funds is an important aspect and may well be central to much of what you do. To ensure success an understanding of how to fundraise effectively is essential and understanding why people give is an excellent place to start. As an organisation, Freemasonry only raises funds through the membership, family and friends. There is no public fundraising undertaken and so you have a focused area of where you can target your activities.

### EFFECTIVE FUNDRAISING

There are many reasons that might be considered for why people donate. Consulting with members to learn and appreciate their attitudes provides a good starting point in the process of how to identify what will motivate them into supporting your charitable activities. Engaging with members and promoting the work of the charities and good causes that are receiving funds also has huge benefits.

There are other basic principles that should be observed. Amongst these are honesty. Being honest and transparent about who the funds are being raised for is vital.

### FUNDRAISING REGULATIONS AND BEST PRACTICE

The MCF is registered with the Fundraising Regulator and as such follow the regulator's fundraising promise. The MCF also adheres to the Fundraising Code of Practice and has a fundraising complaints policy accessible from our website or on request to the MCF.

#### *Fundraising Code of Practice*

Following a consultation process and extensive revision, the Code was re-issued on 1 October 2019 in a much more user friendly format. The code sets out the responsibilities that apply to all charitable institutions and third party fundraisers in the UK.

The code includes details about 'in aid of' or 'in support of' fundraising. This is relevant to how Met/ProvGChStwds, Festival Committees, Lodge Charity Stewards or indeed other members of the Province raise funds. Indeed the MCF is always very clear that fundraising during Festival appeals (and more generally) is undertaken in aid of or in support of the MCF and the information and support we provide is appropriate to this type of relationship.

It is also important to note that the expressions 'in aid of the MCF' or 'in support of the MCF' should be used when fundraising to distinguish your own activities from those undertaken by the MCF directly.

Please refer to Section 2 of the Fundraising Code of Practice for full details.



Fundraising Regulator fundraising promise <https://xxxxx.org.uk>

Fundraising Regulator Code of Practice <https://xxxxx.org.uk>

### ***Vulnerable donors***

Another area that is important to understand is dealing with vulnerable donors. As a Charity Steward you are in the position of asking another to donate to a cause. Given the age profile of Freemasons, it is likely that there are members who could be considered vulnerable donors. A donor may be considered vulnerable because of any number of issues, for instance a change in personal circumstances, health issues or a recent bereavement. It is important that Charity Stewards recognise the signs and rather than focus on gaining a donation consider whether the person may in fact be in need of some form of assistance and support from the charity.

## IDEAS AND INITIATIVES

### ***Regular ongoing giving***

The most effective and efficient means of fundraising is through regular ongoing giving. Encouraging members to set up a regular payment promise (RPP), particularly if Gift Aid can be applied, provides members with an easy to manage, structured and budgeted way of donating. The donor can set the terms of their RPP to ensure that the donations are affordable and continue for a period that suits them. The regularity of their donations can also be arranged at a frequency to suit the donor.

### ***Gift Aid envelopes***

Gift Aid envelope collections are also an efficient and effective way of donating. Many Lodges report more success by using the envelopes at a Festive Board rather than in a Lodge meeting, however this is down to each individual Lodge to decide.

### *Digital Donations*

Digital Donations is a cashless way of donating that allows members to make donations, anytime, anywhere, by simply scanning a QR code or using a unique URL. QR codes have become more widely used over recent times making them more accessible, and less of a challenge, to use.

The QR codes can be printed on lodge summons, can be used on email correspondence, can be placed on lodge websites and shared on social media platforms. For Charity Stewards and/or Relief Chest representatives they will be able to make the reports given at lodge meetings more thorough, as they will be able to include all donations that have been received into the Relief Chest since the last meeting of the lodge, not just those raised at the meeting itself. It will allow members who cannot make meetings to continue to donate and it will make it easier to raise funds at lodge events and special occasions.

### *Fundraising events and activities*

Fun and imaginative fundraising events and sponsored activities have become more and more popular and can encourage members to donate. There are various types of event that can be held. It could be a participation event like a sponsored run or a social gathering or it could be non-participation like a raffle or a prize draw. It is also important to consider the timing of the event. It can be useful to check if and when there are other things going on around the Province, particularly if they are similar activities.

Determining how funds are going to be managed is another consideration. If, for instance, the event is a sponsored activity could the Relief Chest online fundraising platform be used? If so then the participants who decide to use such a page might want to consider these other useful tips;

- Include a photo. Pages with a 'selfie' or other such photos raise around 14% more than those without one.
- More people will take notice of why someone is fundraising if they explain why they are doing it, why they care about the charity. Make sure that they tell their story; give their reasons for taking part.
- It is also a good idea for each individual to give themselves a personal target and make it known. Fundraisers who publicise a target raise over 45% more in terms of actual donations.

- Make sure that everyone taking part shares the event on social media and via email. Spread the word and keep people updated on their progress. People ARE interested!

Donations can also be encouraged if participants can think of ways to get people excited about their fundraising efforts. For instance, they might say that they will do the event in fancy dress if they reach a certain level. And finally, when the activity has been completed, it is a good idea to encourage everyone who has taken part to send out an update. It has been estimated that 20% of donations come in after the event.

### *Tried and tested*

There are lots of established and proven ways to raise funds and these should not be forgotten. Some of the most popular are;

- Guess the time of the Tyler's toast
- Loose change or tiddler box
- 100 club
- Heads and tails
- Raffles
- Quiz nights/Race nights
- Garden parties/BBQs

## LOTTERIES AND RAFFLES

In simple terms a lottery or raffle is a kind of gambling which has three essential ingredients:

- You have to pay to enter the game
- There is always at least one prize
- Prizes are awarded purely on chance

A typical small-scale lottery is a raffle where players buy a ticket with a number on it. The tickets are randomly drawn and those holding the same numbered ticket win a prize.

As well as the three elements of a lottery outlined above, they all **(with the exception of incidental lotteries)** have something else in common: while there is no maximum price for a ticket, in each lottery all tickets must cost the same. That way, everyone has the same chance of winning for the same outlay. Incidental lotteries are the exception to this rule and do not have specific ticket requirements. **This is important to note, as raffles held at Lodge festive boards are classed as incidental lotteries.**

## THE RELIEF CHEST

The Relief Chest Scheme allows Lodges to take control and give more to the charities that they support. Purpose-built for freemasonry, the Relief Chest Scheme offers donor advised funds called Relief Chests within which donations can be securely held until they are ready to be donated to a registered charity.

Individuals can also open their own Relief Chest, enabling them to manage their own charitable donations and disbursements.

Donations can be made into a Relief Chest in a number of quick and easy ways, including via a regular payment promise, gift aid envelopes, Digital Donations, online, over the telephone, by text or by post. An online sponsorship platform is also available making fundraising for a sponsored event easier and more effective.

The MCF produce a useful Relief Chest Guide as well as a range of other material regarding the Relief Chest scheme.



<https://mcf.org.uk/reliefchest>

## LEGACY GIVING AND WILLS

### *General advice on legacies*

For many people, it is important that upon their death, their estate is distributed to family, close friends and the charitable causes they care about most. Having a will can ensure your wishes are fulfilled.

### *Goodwill Partnership/ Will writing*

The MCF is working with the Goodwill Partnership to offer a free will writing service, (the cost of a Goodwill Partnership will is usually £150). Those who choose to use the service will not be expected to leave a gift to the MCF, but any gift that is left will be gratefully received



MCF Legacy and Will resources <https://mcf.org.uk/legacy/>

## MCF HONORIFICS

MCF Honorifics are intended to acknowledge the generosity of members making donations to the MCF and recognise their importance to the charity. The table below outlines the qualifying levels all of which will be marked by the issue of an appropriate certificate.

MCF Honorifics are completely separate and independent of any Festival Honorifics that a Province may operate during a Festival Appeal.

	<b>VICE PATRON</b>	<b>PATRON</b>	<b>GRAND PATRON</b>
<b>Freemasons (individual giving)</b>	£2,000	£4,000	£6,000
<b>Lady/Lewis (individual giving)</b>	£1,000	£2,000	£3,000
<b>Lodges</b>	£10,000	£20,000	£40,000
<b>Chapters and Other Organisations</b>	£5,000	£10,000	£20,000

These honorifics are permanent and are intended to reflect “lifetime” giving. All honorifics will be awarded on the basis of donations received. Donations made to MCF Festivals will count towards MCF permanent honorifics.

Gift Aid will count towards individual giving totals. Individual Giving will not count towards Lodges or Chapters and Other Organisations qualification totals. Chapters and Other Organisations means Chapters, other Orders and all other organisations such as Associations, clubs, Societies and Groups with a Masonic association to include Ladies Associations, Clubs, Societies and Groups. Lewis refers to the uninitiated son of a Freemason.

## 5. COMMUNICATIONS

Communication as a Charity Steward is an essential and vital part of the role. Communicating with members of the Lodge and within other Lodges within the Province is vital if you are to hold successful fundraising events and for sharing ideas. How information is communicated will depend on your audience and scope of message

### SOCIAL MEDIA

Social media will undoubtedly feature as one of the ways that is used to communicate with members. However, it is important to understand the various benefits and pitfalls of using social media and as such the United Grand Lodge of England have published Social Media Policy and Guidelines.



<https://www.ugle.org.uk/social-media-policy-guidelines>

These guidelines cover:

- An introduction to Social media at UGLE
- Facebook
- Twitter
- Instagram
- Social Media policy

Social media platforms provide a simple way for members to connect regardless of geographical location, thus making it much easier to find out about Masonic events (e.g. Lodge meetings) and endeavours (e.g. charitable causes being supported) at a local, national, and international level. They also make it possible to engage in discussion about Masonic topics with Freemasons anywhere in the world, thus enabling members to make their daily advancement by learning from a far larger community.

Social media also provides an excellent way to engage younger members, most of whom will already use these platforms in their personal and professional lives. In this sense, they can help Freemasonry remain relevant and accessible to young Masons, who will derive great value from being able to access a wide variety of Masonic content, and interact with other Masons like themselves, through the same channels that they already use on a daily basis.

## USE OF PHOTOGRAPHS

It is important to remember that you must gain consent from those who may appear in photographs when you are using them.

Depending on the circumstance of where and how the photographs were taken, for example at an event that had clear signage that a photographer was being used and that photos may be published or by using consent forms from those feature, your Province should have a policy in place and the appropriate forms.

Always check with the Metropolitan/Provincial Grand Secretary or Communications Officer for the correct guidance and procedures that have been adopted in your Province.

## EMAIL AND POST

The use of email will also be a key way to communicate. A word of caution however, sending too many e-mails may dilute your message and potentially switch members off.

In the modern age never forget the power of a personal letter delivered through the post. Many people receive large numbers of digital messages both at work and via Freemasonry and these can be missed or ignored. If you have an important message to share why not consider posting it.

## 6. DISBURSING FUNDS AND GRANTS

Disbursing funds, whether at a Metropolitan, Provincial or Lodge level is a vital part of the fundraising process. Members who have made donations will want to know that their contributions have been used wisely and effectively and as such there are considerations that need to be made when selecting your beneficiaries.

### CHARITABLE AND NON-CHARITABLE FUNDS

As a Charity Steward it is essential that you can understand and differentiate between charitable and non-charitable funds as well as ensuring that any recipient is bona fide. This is important as you may be called on by to assist in identifying which funds can be used for which purpose. In summary, charity is a need and benevolence is a kindness.

#### *Charitable funds*

The purpose of charity is defined as the voluntary giving of assistance to those in need and is strictly defined in the list of 'descriptions of purposes' in the Charities Act 2011. Thus, funds raised in the name of charity can only be disbursed for truly charitable purposes, such as donations to charities or to individuals in cases of real need or proven hardship. Charitable funds cannot be used for purposes such as flowers, and Christmas or birthday gifts.

#### *Non-charitable funds*

Benevolent and welfare funds derived from funds not raised in the name of charity and have fewer restrictions. Funds can be used for a wide variety of benevolent and welfare purposes and are appropriate funds for flowers, and Christmas or birthday gifts. Gift Aid cannot be claimed against donations made to such funds.

### SUPPORTING LOCAL CHARITIES AND GOOD CAUSES

#### *How to identify*

When considering which charities to support it is worth thinking about the area of support to focus on. For instance young people or mental health? Does the Lodge have a strategy or plan? Is there a local charity that the Lodge wishes to build a relationship with? Is there a Metropolitan or provincial strategy that the lodge wants to align with?

### *Due diligence*

It is extremely important to ensure that the beneficiary is legitimate and that grants made will be used effectively. There are some simple tasks that you can undertake in terms of due diligence when considering which charities to support.

These tasks include:

- Check that the charity is registered with the Charity Commission for England and Wales.
- Take a look at their Annual Report and Accounts which should be published on the Charity Commission website. It is a good idea to read the Financial Review section in the Annual report as it helps put the accounts into context.
- Look at the charity's website and social media pages, are they consistent with what they have told you in their application?
- Do a quick Google search to see if they have received any unfavourable coverage in the recent past.



Link to the Charity Commission Website

### *PR and engagement*

When you have identified a charity that you wish to support, it is a good idea to work with that charity in terms of gaining some positive PR and communications. Encourage them to promote the donation on social media and ensure that your own Provincial Communications team share any social media output.

### *Awarding the grant*

When it comes to making the grant there are a number of things that you can do. You can simply send the donation, either by cheque or bank transfer. You could invite the charity to attend a presentation at the Lodge You might ask the charity if you can visit them to present the donation. Ultimately it will be determined by what suits both the Lodge and the charity.

### *Follow-up*

Any grant that you make should be done so with impact in mind. What impact is the donation going to make? How and who will it impact? A good way to demonstrate this impact to your members is to make a visit to the charity a few months after the grant was made to find out how the grant was used. If you are able to create a story around how your

members' donations have been used and the impact that they have made, you can use this to encourage your members to continue to support your charitable ambitions.

It is also a good idea to maintain contact and build relationships with charities that are happy and able to promote your contributions and work with you to promote both their work and the support that they receive from your members. This can create long term partnerships that brings benefits to all concerned.

### SUPPORTING THE MCF

The MCF is the Freemasons' charity and as such funds are only raised through the membership. The MCF relies on Freemasons and their families for donations and that is why it is always appreciated when donations are received. Nearly 75% of MCF income comes through members' donations and contributions, of which well over half comes through Festival Appeals.

#### *Supporting when in Festival*

Festivals provide the biggest single source of income. When a Province is in Festival, the focus for fundraising will gravitate towards the MCF. The Provincial Festival Team will have been working with the MCF to establish all the ways in which Lodges can disburse funds to the Festival Appeal.

#### *Supporting when not in Festival*

If there is not a period of Festival taking place then Metropolitan and Provinces and the Lodges and members within, can of course continue to support the MCF and there are many ways in which to do so. Details of all these methods are on the MCF website.



Links to MCF Donation page

## 7. ADMINISTRATION AND HANDOVER

### ADMINISTRATION

As Charity Steward, you occupy a position of trust and responsibility as the custodian of your members' charitable donations. Lodges organise their administrative arrangements in many different ways but it need not be complicated.

It is essential that accurate records of all charitable donations, investments and disbursements are maintained and reported upon, if and when required by the Lodge. The Book of Constitutions, Rule 153, requires the preparation and presentation of the annual accounts to members, in respect of all charitable funds. This may be undertaken by the Charity Steward or Treasurer alone or in conjunction (see the Book of constitutions, Rule 153). Remember, how much members give to charity is confidential between you and the member in the same way as those that receive assistance is private between a member and their Almoner.

Examples of information that you should record are:

- Cash, cheque and envelope donations from individual members
- Details of each member's Direct Debit and Standing Order (particularly commencing and concluding dates)
- Gift Aid Declarations
- Members' wishes as to the recipient(s) of personal donations
- Charitable collections
- Festive Board raffles
- Fundraising from all social events
- Details of disbursements

The information published by the Treasurer should not contain details of any personal amounts but only overall totals. Your records should be appropriately examined.

In many ways, the Met/ProvGChStwd's administrative role expands on the Lodge Charity Steward's administrative duties. Similar records at Metropolitan/Provincial level should be kept for Metropolitan/Provincial charitable activity and there is a similar requirement for preparation and presentation of the annual accounts to members, (this may be undertaken

by the Metropolitan/Provincial Treasurer, the treasurer of a Metropolitan/Provincial Charity or Charity Committee, by the Met/ProvGChStwd or a combination of all involved). Again, records should be appropriately examined.

It is useful to collate charity donations for Province in summary and this can be completed by asking each Lodge to complete an annual return. The MCF ask for annual returns for Metropolitan and Provincial Grand Lodges and have an approved template which can be used. An additional outcome is that a summary of charity giving can be communicated back to Lodge Charity Stewards.



[Link to MCF charity return template](#)

### GENERAL DATA PROTECTION REGULATIONS (GDPR)

It is vital that when administering the duties of the role, full consideration is given to the GDPR. Your Metropolitan/Provincial Grand Lodge will have a GDPR policy which you should ensure you have read and understood. The MCF also have privacy policies in place.



[Links to MCF Privacy policy](#)

[Links to GDPR information and resources](#)

### SUCCESSION PLANNING AND HANDOVER

#### *Identifying your successor*

The responsibility for appointing a Charity Steward within a Lodge lies with its Master but he may wish to be guided by you as it is often difficult to identify a competent successor and there are things that can be done to support this process. Identifying members who have assisted in fundraising endeavours, identified new methods for increasing donations, shown a keen interest in raising funds by gentle persuasion rather than by demanding money with menaces and proved to be a capable organiser are those to consider.

These are members who should be encouraged to attend seminars and workshops to gain an understanding of charity matters prior to being considered for appointment.

Lodges and current Charity Stewards should not only consider a Past Master of the Lodge to take on this role. If there is a period of time to wait before taking office, a younger member may be interested in taking on this role. Enthusiasm counts just as much as experience.



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