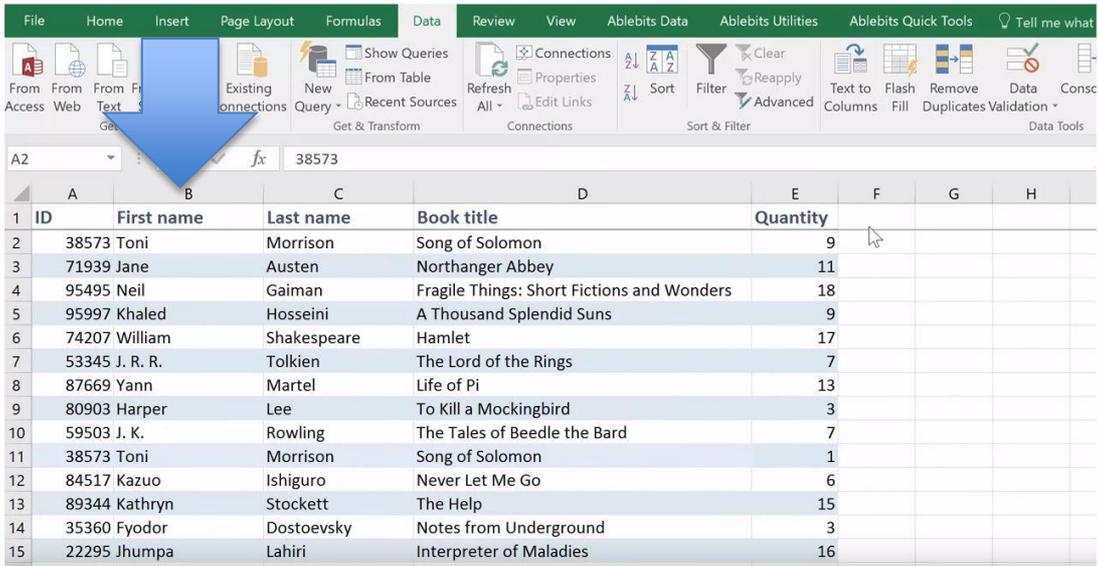**Masonic**
Charitable Foundation

Top tips: Record keeping

Maintaining good records of Brethren and their families is an essential part of being a lodge almoner and keeping in touch with lodge members and their families. The Masonic Charitable Foundation asked a group of Metropolitan/Provincial Grand Almoners (MetGA/PGAs) for their top tips which are shared below:
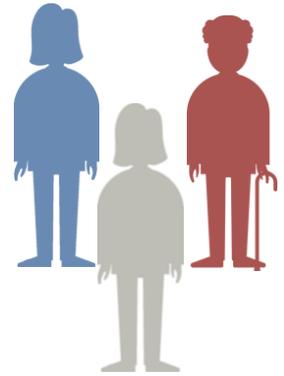
1. **Create one central set of records.** There is no need to manage multiple lists and this will lead to confusion when updating them. One central source of information will ensure that your data is reliable and fit for purpose.

2. **Use a spreadsheet.** When creating and managing your contacts, a simple spreadsheet using Microsoft Excel or Google Sheets will do everything you need. With a few clicks you can manage and manipulate data for a range of tasks. If you don't have a Microsoft Excel license a free alternative with similar features is Google Sheets - **www.google.co.uk/sheets/about**

3. **Segment the data.** By inserting columns or 'fields' into a file, it is possible to categorize and sort your data making it easy to locate records and prepare information for targeted groups. For example, widows and partners or other family members. To assist with categorizing your records, it is recommended assigning an ID number to each new record added to the spreadsheet. An example is shown below:

For Freemasons, for families, for everyone

4. **Record significant dates.** Including a date of birth column or 'field' will assist with managing birthdays and sending out those all-important birthday cards to members, and their widows or partners. Never underestimate the simple act of sending somebody a birthday or anniversary card.

5. **Regularly check your records.** Keeping your records free of duplicates and up to date is vital. One way of ensuring your records are up to date is by checking a person's contacts details whenever you speak to them. Similarly, you should regularly check your data to ensure it remains free of duplicate records. This can be done by sorting the data in your spreadsheet into alphabetical order as shown in **this video**.

You can then remove the duplicate record by deleting the relevant line (known as a row) by right-clicking the row to be deleted and then selecting 'delete' as shown below:
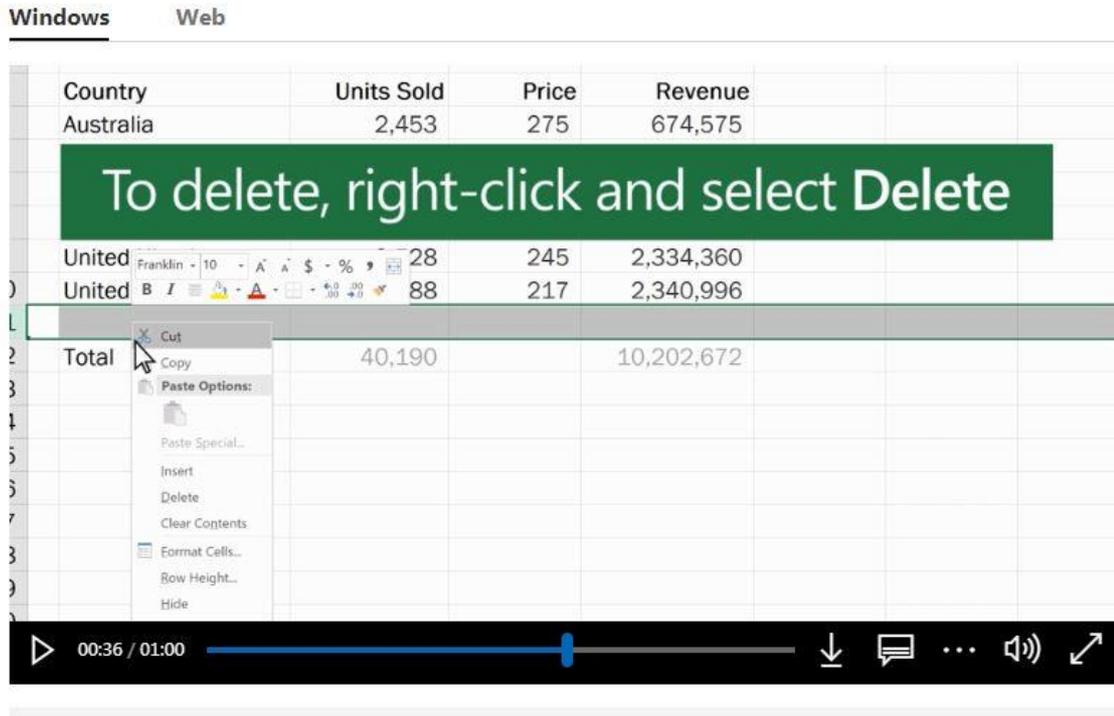
6. **Be familiar with data protection guidance.** There are legal rules to follow when keeping personal information. Read the MCF's **Data Protection factsheet** for further and practical steps on managing data.

Further information relating to maintaining records and keeping in touch can be found in the Almoner's Guide.

www.mcf.org.uk/almoner