



Charity Steward Information Pack

2022

John Birkenshaw – ProvGChStwd

Updated April 2023

Foreword

I am delighted to be your new Provincial Grand Charity Steward.

On my appointment at the Provincial Grand Lodge in May 2022, I hit the ground running. I have had the pleasure of attending four out of the five Area Charity Stewards' Briefings and I have enjoyed meeting many Charity Stewards from across our Province.

I am mindful that not everyone could attend the Area Briefings for one reason or another but I believe that these sessions are vital to improve your knowledge and understanding of Charity in its widest sense. The Briefings provide up to date information, especially changes that have been made or impending changes which may affect your role and the manner by which you implement it.

I have received some very interesting and informative feedback from hardworking Lodge Charity Stewards and I have listened and acted immediately on what they told me, particularly improving lines of communication to ALL Charity Stewards in the Province.

I have taken the time to design and publish this Charity Steward's Information Pack which contains subject matter delivered by eminent speakers at the Briefings. Hopefully you will find it a useful reference document when preparing presentations, not only to the brethren of your Lodge but to agencies, charities and communities outside Freemasonry to widen their knowledge of our Order and its precepts.

I am fortunate to have a brilliant team of Area Provincial Charity Committee Chairs around me who are supported by hard-working and enthusiastic PCA's, all of whom work tirelessly to support you. Should you require any help, advice or support, we are all here to support you in your terrific endeavours.

Thank you all thus far for your hard work and I look forward to working with you during the upcoming 2028 Festival.

kindest fraternal regards

John Birkenshaw
Provincial Grand Charity Steward

APPENDIX 1

CHARITY STEWARD'S ROLE

Lodge Almoners and Lodge Charity Stewards are regarded as very important roles in a Lodge. The Charity Steward's role is not too onerous and to some extent runs itself, as members are encouraged to donate regularly by bank Standing Order, cash or cheque. By Standing Order is the preferred way as once it is set up it simply needs reviewing periodically. The role can be described simply, as **MONEY IN, MONEY OUT**

MONEY IN

1. Encourages members to make regular charitable donations to Masonic charities and Charity Stewards to provide receipts to members paying by cash or cheque.
2. Keep Charity account up to date (from bank statements and receipts).
3. Produce a year end account which is audited by *the Lodge Examiners and* passed in open Lodge.

MONEY OUT

1. **Find** and promote the finding of **local charities** or other worthwhile organisation **in need of support**, i.e. funding to purchase specific equipment for their use (they need not be a registered charity).
2. **Provide funding for the above** by means of:
 - (a) **Funding directly from a Lodge** by:
 - i. Raffles at a Festive Board.
 - ii. The Lodge Treasurer from Lodge Funds.
 - iii. A specific appeal within the Lodge.
 - (b) **West Riding Masonic Charity Fund** – A specific Application Form and advice on its completion is on the Internal Provincial website.
3. **Provide a Monthly (Lodge Meeting) & Annual Report** (Scroll Night):-

The Monthly Report – a quick update of the previous month's activities and any news from the PGM, Provincial Grand Charity Steward or the Chair of their Area Charity Committee. If there is no news, explain TLC, WRMCF, etc.

The Annual Report -

- i. Number of Lodge Members.
- ii. Number of Lodge Members donating.
- iii. Total funds raised in past 12 months – (regular giving & raffles)
- iv. Details of Charitable Grants, Amounts and Recipient from:
 - (a) The Lodge.
 - (b) WRMCF

AND IMPORTANTLY

- (c) Details of publicity received.
- (d) Latest developments from PGL

CHARITY STEWARD'S ROLE Continued

MONTHLY ROUTINE

Payments by bank 'Standing Order'

Most donating brethren pay by Standing Order and a monthly statement posted to or received electronically by you shows details of all payments received the previous month.

- i) Simply enter all the payments into the Charity Steward Account Book and keep a running total each month.
- ii) Each quarter complete the 'Donation to Charity Form' previously received from West Riding Masonic Charities (WRMC) showing the total donations by each individual member for that quarter.
- iii) Send payment electronically by Bank Transfer and email the 'Donation to Charity Form' to WRMC at PGL.
- iv) PGL will send a receipt together with a further Donation to Charities Form and a separate form showing running totals of each individual member (*Cumulative Receipts Summary*).

Payments from Brethren by Cash or Cheque

Some may prefer to pay by either cash or cheque.

If so:

- i) Issue a Receipt from the Official Receipt Book showing the amount and date (keep a copy).
- ii) Enter the sum of money in the Charity Steward Account Book.
- iii) Deposit the payment into the Charity Steward Account.

DONATIONS TO LOCAL CHARITIES

Each time you achieve a charitable Grant:

- a) Arrange a formal presentation.
- b) Encourage the charity to seek publicity and approach the media yourself.
- c) Seek assistance from the Area Comms. Officer.
This ensures good publicity for:
 - i. The Charity
 - ii. The Lodge Involved
 - iii. West Riding Masonic Charities Ltd. and or MCF
- d) **REMIND YOUR LODGE** –
 - i. Explain the impact it has made on the charity concerned.
 - ii. Emphasise the total funding your Lodge has received (in £'s), and the total number (??) of charities that have benefitted from the PGMs Fund.

APPENDIX 2

A few useful facts about how generous we as a fraternity are:

- **Freemasons** are one of the largest donors in the UK to charity, the largest being the National Lottery.
- **In 2021 Freemasons donated £51.1 million** to charity (MCF & WRMCL). All funds raised were from within its membership.
- **In 2020 Freemasons provided** a total of **18.5 million voluntary hours** of their time to worthwhile causes.
- **Since its formation in 1987** the WRMCF (previously the PGM's Fund) has made 3,736 Grants totalling £4,805,000, of which 84 Grants totalling £1,548,000, have been Major Grants (these figures are current as of October 2022).
- **During the Pandemic** WRMC awarded £1.07million in Grants to charitable organisations. Many were food banks and those organisations providing services to homeless, isolated and vulnerable people.
- **Our Recent Ukraine Appeal** raised £40k from Festive Board Raffles in May & June. WRMC match funded it, therefore £80k went to the Appeal.
- **WRMC have gone into partnership** with the 2 Lord Lieutenant's Schemes covering West & South Yorkshire. They have made a commitment to allocate £35K to each area per year for 3 years to support and award grants to Charities and organisations that have been Identified by the Schemes. Talks are currently being held with the Lord Lieutenant in the North of the Province.
- **The Spitfire Raffle** raised £20,000 through the generosity of local masons.

APPENDIX 3

West Riding Masonic Charities Ltd.

We are the only Province in the UK with its own Dedicated Independent Registered Charity, West Riding Masonic Charities Ltd. It was originally started in the early 1800's, in 1947 it became a Ltd Co., and currently has a Board of 8 Directors with up to 4 co-opted members. It is divided into 3 areas:

1. West Riding Masonic Care And Support Fund (Formerly CHOICES)

The West Riding Masonic Care and Support Fund was set up to help and support whenever a West Riding Freemason, his family or dependants are:

- a) In Financial Distress;
- b) Have an Urgent Need;
- c) Have other immediate and pressing requirements.

It is a confidential service which can respond within 24 hours to a claim for assistance and has a 3 day resolution target. It can be accessed through your Lodge Almoner, the Provincial Almoner, The Confidential Telephone Helpline and e-mail or directly with the West Riding Masonic Care And Support Fund Team.

The Team have 3 trained specialist Care & Support Officers who provide advice and arrange the appropriate support. One of the Care & Support Officers, Claire Beaumont spends time with brethren or their families ensuring that the correct benefits are claimed e.g., Attendance Allowance, Carers Allowance and Personal Independent Payments, etc. Since she started 12 months ago she has assisted in the claiming of over £300,000 in allowances for brethren and their families – this is not a one-off payment - it is for the recipient's life.

Other examples of assistance include the provision of essential home furnishings & equipment; minor home adaptations; repairs & maintenance; health; social; respite & convalescent care. Over £289k in grants has been provided to 60 applicants in the last year.



2. Teddies for Loving Care (TLC)

TLC was instigated in 2001 by Essex Province. We started the Scheme in 2007 and are very proud to say over 200,000 Teddies have since been provided to 17 A&E facilities, Trauma Centres and even Air Ambulances across our Province to provide comfort to distressed children. When a young child attends they receive a teddy which helps reduce the trauma - if they are to receive an injection the staff inject the teddy to show it does not hurt, equally they apply bandages to the limbs of the teddy relative to the injuries of the child. Over 3 million Teddies have been distributed nationally. In our Province the Scheme is administered by Keith Bradley who will provide a large Teddy to Lodges to raise funds, if requested.



3. West Riding Masonic Community Fund (WRMCF)

(Formerly Provincial Grand Masters Fund (PGMs Fund))

Created in 1987 to enable West Riding Masonic Charities Limited to make grants to non-masonic community organisations and charitable institutions in the Province of Yorkshire, West Riding.

Local Freemasons can choose by voting on a proposition in open Lodge to apply to the WRMCF Fund to sponsor a suitable project for a registered charity or other worthy cause within the Province. A specific Application Form and associated advice on its completion is on the Internal Provincial website.



There are two types of Grants available:

Major Grants:

- These are now considered twice a year with deadlines at the end of February and August. They will be considered towards the end of March and again towards the end of September annually.
- The aim is to make a major and significant difference to the organisation and the project being considered.
- Each application is judged on its own merit and an average of £250k in annual grants goes to local worthy charitable causes. £300k has been awarded to the year ended 30th September 2022.
- Whilst there is an opportunity to provide a single grant of £100k (this is a typical sum not a cap - £110k was awarded to Major Grants to year ending 30th September 2022.) It is usual to see the total sum being shared by a small number of applicants for Major Grants which exceed £5k.

Minor Grants:

- Up to £5,000 can be applied for.
- Can be applied for throughout the year by any local Freemason and will be considered, following due diligence, by the WRMCF Fund Committee when required to meet. i.e. demand led.
- During the Pandemic applications were judged weekly by Zoom meetings.

Since its formation in 1987 the WRMCF Fund has made 3,736 Grants totalling £4,805,000 of which there were 84 Major Grants totalling £1,548,000 (These figures are current as of October 2022).

- The proposed recipient need not be to a registered charity e.g. local youth football team.
- Easy process - details are on the Internal Provincial website. Money is there to give away.
- There is a need for brethren to recommend worthwhile causes to assist you in finding suitable grant recipients.
- Need not be in your immediate area but must be within our Province.
- Vital - suitable publicity is attracted for both organisations.

Key Facts about Current Charitable Giving in our Province

- a) Currently Only 47% of members in our Province regularly donate to Masonic Charities.
- b) This means that 53% **do not** donate.
 - If those members who are NOT contributing donated £1 per week this would equate to £2,650 per week, £10,600 per month and £127,200 per year.
- c) Gift Aid means that for every £100 donated, £25 can be claimed as Gift Aid.
- d) If you are 40% taxpayer you can personally claim back £25.00 (£125 x 20% / £100 donated).

APPENDIX 4

Masonic Charitable Foundation (MCF)

- Established in 2016.
 - **Previously** there were **4 separate Charities:**
 - a) Samaritan Fund
 - b) Royal Institute for Girls & Boys
 - c) Grand Charity
 - d) RMBI (Care Homes)
 - It made sense to incorporate all the Charities under one Foundation.
 - Helped over 3,000 masons and their families providing cradle to grave care.
 - Application can be made direct via the MCF website by organisations or via Charity Stewards or indeed anyone.
 - Unlike the WRMCF there are no restrictions on how the money can be used.
 - **It provides support for**
 - For those in poverty, debt or unemployment
 - Health and disability for people experiencing chronic or life-limiting conditions and disabilities
 - Education and employability for disadvantaged children and young people
 - Social exclusion and disadvantage for those facing barriers to participating in society
 - **It also provides funding each year to:**
 - Advance medical and social research
 - Hospices throughout England and Wales
 - Air ambulance and rescue services
 - Fund research by the Royal College of Surgeons.
 - MCF Representatives in our Province are Ian Wright & Mike Holmes.
 - Visit the MCF website: www.mcf.org.uk to find out lots of information, including material for charity presentations.
 - They also offer a free will writing service.
-
- **Sign up to their mailing list to receive monthly reports/updates.**



FACTS & FIGURES

Every year, MCF supports 3,000 Freemasons and their families across England and Wales at a cost of £15 million and impacts on the lives of tens of thousands more in wider society through £5.5 million in grants to other charities and worthy causes.

Over 1,000 residents currently live in masonic care homes, including many older Freemasons and their family members.

External recent grants have included:

- £25,000 to Arthritis Care
- £60,000 to Dementia UK
- £45,000 to Jo's Cervical Cancer Trust

In the year April 2021 – March 2022 total grants awarded nationally by MCF

- 2,273 grants for daily living costs - **£8,442,307**
- 1,073 grants covering health, care and wellbeing - **£2,364,001**
- 665 grants supporting Children, young people and education - **£1,757,071**
- Over 1,000 grants totalling **£8 million** to charities in England and Wales
- 219 grants to hospice services - **£800,000**

Between 1 April 2020 and 31 January 2021, the MCF awarded 607 grants to local and national COVID-19 relief projects totalling £3.2 million.

In the year April 2021 – March 2022 grants from MCF within The Province of Yorkshire West Riding:

173 grants were made to Freemasons or their dependents of - **£421,536**.

This was made up of: -

- 24 grants supporting Children, young people and education - **£34,910**.
- 101 grants to assist with daily living costs - **£294,958**.
- 48 grants covering health, care and wellbeing - **£91,668**.
- 25 charities received - **£111,093**.

It included grants:

- To 15 hospices.
- A grant of £49,123 to Leeds Mind (Later Life Befriending in Leeds).
- £15,000 to Leeds Weekend Care Association.
- £15,000 to Moor Allerton Elderly Care.
- and £10,000 in matched funding that was split across 7 charities..

Support provided to our Province since the MCF was created in April 2016: -

- 1,127 grants have been provided to Freemasons amounting to - **£2,454,162**
- 165 charities have been supported with grants totalling - **£1,123,482**

In total MCF support in this Province has been a remarkable Total of **£3,577,644**

The Main source of income for the MCF is through generous donations by Freemasons and their families and by the Festival System. (See Appendix 5, 'The Festival System')

[Sign up to MCF mailing list to receive monthly reports/updates at: www.mcf.org.uk](http://www.mcf.org.uk)

APPENDIX 5

THE FESTIVAL SYSTEM

Q. What is a Festival?

A. It is a way of raising money for the Masonic Charitable Foundation (MCF) by Provinces in England and Wales who organise fundraising appeals known as “Festivals.”

Q. Why do we have Festivals?

A. Festival appeals are a vital source of funding and generate the majority of donations made to the MCF.

- They provide the biggest single source of income to the MCF.
- They also provide an opportunity to increase the awareness of the work the Foundation undertakes and the support it provides to Freemasons and their families, as well as other charities and worthy causes.

Q. How long does a Festival Last?

A. A Festival appeal usually lasts for five years.

Q. When do they occur?

A. Each year 4 Provinces launch a new Festival appeal to help fund MCF work.

Q. When is our next Provincial Festival?

A. Our Province commences a Festival in September 2023.

Q. What happens during a Festival?

- When a Province is in Festival the focus for fundraising will gravitate towards the MCF.
- During the five year appeal fundraising events and activities take place that make a significant contribution to its income.
- During the Festival period Lodges and individual members use their creative skills to raise large amounts for donation, for example - sponsored events, Dinner Dances, Family Days of Fun Activities etc.

Q. Who arranges the Festival?

A. 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.

The MCF are extremely grateful for the hard work and generosity of Freemasons who support their Festival appeals.

APPENDIX 6

USEFUL FACTS ABOUT OUR PROVINCE

- **Over 170** Lodges in the Province, in **45 Towns & 5 Cities**
- **Around 5,000 Members**
- **Covers** whole of West & South Yorkshire and parts of North and East Yorkshire.
- Area of some **2,350 square miles** from Ripon in the North to Sheffield in the South, Bentham in the West to Goole in the East.
- Province is divided into **5 Areas:**

AREA 1: APMG: Michael Dyson PCC Chair: Chris Binns

Consists of **29 Lodges** in: Haworth, Keighley, Bingley, Baildon, Bradford, Dewsbury, Mirfield, Cleckheaton, Heckmondwike. There are 25 Liaison Officers, 4 Mentoring Co-ordinators and 2 Installed Masters' Associations.

AREA 2: APMG: Robert Cole PCC Chair: Gerald Dickinson

Consists of **32 Lodges** with a membership of over 1100 Masons meeting in 15 Masonic Halls: situated in the Pennine area which covers the significant conurbations of Huddersfield, Halifax and Brighouse. The Lodges extend from Todmorden and Uppermill in the West, Hipperholme on the Northern boundary, Brighouse in the East and Holmfirth to the South. Two of these, The Rugby Football Lodge and The Sub Aqua Lodge, feature members who have special social interests associated with the name of their Lodge.

AREA 3: APMG: Andrew Wright PCC Chair: Mike Wrigglesworth

Consists of **31 Lodges** with a membership of over 1,100 Masons & 27 Liaison Officers. The Lodges occupy 13 Masonic Halls at: Barnoldswick (2), Bentham (1), Guiseley (1), Harrogate (6), Ilkley (3), Knaresborough (2), Otley (6), Pateley Bridge (1), Ripon (2), Settle (2), Skipton (2), Waddington (1) and Wetherby (2). Area 3 is situated in an 'area of outstanding natural beauty' and includes the World Heritage Site of Fountains Abbey, the Cathedral City of Ripon, the conference town of Harrogate and the Dales market towns of Otley, Skipton and Settle.

AREA 4: APMG: Chris Allen PCC Chair: Robert Jenkins

Consists of **48 Lodges** with 22 of them meeting at Tapton Hall, Sheffield (several of these are Derbyshire Lodges). Lodges also meet at Barnsley, Doncaster, Thorne, Goole, Bawtry, Swinton, Rotherham, Penistone. Area 4 is the **Southernmost area in the Province** with Barnsley in the North, Sheffield in the South and Goole at its most Easterly. It borders 2 neighbouring Provincial Provinces, The Province Yorkshire North & East Riding & Province of Derbyshire.

AREA 5: APMG: Fraser McPherson PCC Chair: Edward Morris

Consists of **48 Lodges** in 9 Masonic Halls in Leeds, Pudsey, Castleford, Pontefract, Wakefield, Morley and Batley. Under half of the areas Lodges are based in the 2 Masonic Halls in Leeds. It is **the 2nd largest** in the province in terms of the number of Lodges but having the smallest number of Lodge premises.

APPENDIX 7

MONTHLY CHARITY STEWARD REPORT (see Appendix 1 - Paragraph 3, Role of CS – ‘Money Out’)

***You should have an Agenda Item on your Lodge Summons
To Provide your Charity Steward Report
If not – ask your Lodge to Include One***

The monthly Charity Steward’s report informs members on latest charity news from PGL and UGLE.

It also provides an opportunity to discuss the Wider Issues of Charity, for example, the below useful items:

USEFUL ITEMS

1. West Riding Masonic Care & Support Fund (WRMC&SF)
2. West Riding Masonic Community Fund (WRMCF)
3. Teddies For Loving Care (TLC)
4. How to measure Success (Appendix 8 below)
5. Headline Facts & Figures
6. Own Lodge Successes
7. Gift Aid
8. Making A Will (See MCF Web Site for details)
9. West Riding Masonic Charities Limited
10. The Role of Charity Steward
11. The Role of the PCA
12. The Masonic Charitable Foundation (MCF)
13. The Festival System

APPENDIX 8

MEASURING SUCCESS

Understanding Metrics Used to Measure Success.

The Amount of Money Collected Annually is one of the Main Success Measures.

However, there are other factors:

- a) Number of donations to Charities (Locally)
- b) Amount donated to WRMC or the other Masonic Charities
- c) Number of Members 'Regularly Giving'
- d) Number of Members signed up for 'Gift Aid'
- e) Number of Presentations made by Charity Stewards
- f) Number of Meetings attended by PCA's
- g) Support Provided to Almoner
- h) Number of Grants applied for, to WRMCF
- i) Number of Successful Grants awarded by WRMCF
- j) Amount of Publicity Generated by each Lodge relating to Giving

APPENDIX 9

EXAMPLE LETTER – CHARITY STEWARD

Address line 1

Date

Ref: Regular Charitable Giving

Dear Brother,

I am a Freemason and very proud and honoured to be your Charity Steward.

The reason I joined masonry is because of the friendship and charitable work we enjoy. Charity is the bedrock upon which masonry is founded. I always reflect on those immortal words from the presentation of the North East Corner at my Initiation into Freemasonry - ***'you will think on that peculiar moment you were admitted into Masonry, poor and penniless, and cheerfully embrace the opportunity of practicing that virtue you profess to admire'***.

Currently only 47.42% of all brethren in the Province give regularly to Masonic Charities and coincidentally less than 50% of our members give regularly. This means that **52.48% (3,000)** of all brethren in the Province do not contribute. If each of those contributed £1 per week, it would raise an additional £3,000 per week (£12,000 per month or £144,000 per year).

We, in our Lodge have enjoyed many successful grants from the Provincial Grand Masters Fund for local Charities in recent years, we have received?? Grants, totaling over £??,000.

I would therefore, like to provide you the opportunity to make regular masonic charitable contributions. There is no set amount and any amount you may wish to contribute will be in total confidence and gratefully received and most certainly, faithfully applied.

Most members make charitable donations by Standing Order; either monthly, quarterly or annually.

I have attached a Standing Order Mandate together with a Gift Aid Declaration form should you kindly decide to donate. It is very important to complete a Gift Aid Tax Relief Form which entitles the masonic charities to claim tax relief. For example, someone donating £100 to charity enables the charity to claim Gift Aid making the total donation £125. If you pay 40% tax you can personally claim back £25.00 (£125 x 20%).

I would be grateful if you could return the completed forms to me for processing as soon as possible.

Yours fraternally and with sincere regards, ???????????

Charity Steward