



Charity Steward Information Pack

John Birkenshaw
Provincial Grand Charity Steward

(updated January 2025)

Foreword

I am delighted to be your new Provincial Grand Charity Steward and on my appointment in 2022, I hit the ground running.

I have had the pleasure of attending numerous Area Charity Stewards' briefings and I have enjoyed meeting many Charity Stewards. across the Province

I am mindful that not everyone could attend the briefings for one reason or another; however, it is important to stress that these sessions are vital to improve knowledge and understanding of Charity in its widest sense. Briefings provide up to date information on recent changes or impending changes which may affect the Charity Steward role.

I have received some very interesting and informative feedback from hardworking Lodge/Royal Arch Charity Stewards. I have listened and acted decisively on what I was told, particularly improving lines of communication to all Charity Stewards.

It has taken time to design, publish and update this Charity Steward's Information Pack which contains useful advice and information. Hopefully, Charity Stewards will find this a useful reference document for making presentations, not only within Lodges/Chapters, but to other agencies, charities, and communities outside Freemasonry to enable them to widen their knowledge of our Order.

I have a brilliant team of Area Provincial Charity Committee Chairs supporting me who are supported by hard-working and enthusiastic PCA's; all of whom work tirelessly to support Charity Stewards across the Province.

Should any Charity Steward require help, advice or support, I can assure them that my team and I are here to support them.

I would like to thank all Charity Stewards throughout the Province for their commitment to their role, and look forward to working with them throughout the Festival.

Kindest Fraternal Regards

John Birkenshaw

Provincial Grand Charity Steward

APPENDIX 1

CHARITY STEWARD'S ROLE

Lodge and Royal Arch Almoners and Charity Stewards are very important roles in our Lodges and Chapters. The Charity Steward's role is not too onerous a job, and to some extent runs itself; as members are encouraged to donate regularly by bank Standing Order, cash or cheque. Donating by standing order is the preferred way, as once they are set up, they simply need reviewing periodically. The Charity Stewards Role can be described simply, as MONEY IN & MONEY OUT

MONEY IN

- a) Encourages members to make regular charitable donations to Masonic charities and Charity Stewards to provide receipts to members paying by cash or cheque.
- b) Keep Charity account up to date (from bank statements and receipts).
- c) Produce a year end account which is audited by the Lodge/Chapter Examiners and passed in a meeting.

MONEY OUT

Find local charities and other worthwhile organisations in need of support, i.e. funding to purchase specific equipment. (they need not be a registered charity).

1) Provide funding for identified charities/causes by:

(a) *Funding directly from a Lodge/Chapter/Chapter by:*

- Raffles at a Festive Board.
- The Lodge/Chapter Treasurer from Funds.
- A specific appeal within the Lodge/Chapter.

(b) *West Riding Masonic Community Fund* – A specific Application Form and advice is on the 'Members' Provincial website.

2) Provide a Monthly (Lodge/Chapter 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. (refer to appendix 7)

3) The Annual Report -

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

AND IMPORTANTLY

- Details of publicity received.
- Latest developments from PGL

CHARITY STEWARD'S ROLE *Continued*

MONTHLY ROUTINE

- Payments by bank 'Standing Order'
- Most brethren donate by Standing Order and monthly bank statements provide details of all payments received the previous month.
- Simply enter all the payments into the Charity Steward Account Book and keep a running total each month.
- Each quarter complete the 'Donation to Charity Form' received from West Riding Masonic Charities (WRMCL) showing the total donations by each individual member for that quarter.
- Send payment electronically by Bank Transfer and email the 'Donation to Charity Form' to WRMCL.
- 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 brethren may prefer to pay by either cash or cheque.

If so:

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

DONATIONS TO LOCAL CHARITIES

Each time you achieve a charitable Grant:

- Arrange a formal presentation and invite the Worshipful Master/Chapter Principle, Lodge/Chapter brethren, the Provincial Charity Assistants & Area Provincial Charity Committee Chair.
- Encourage the recipient to seek publicity and approach the media yourself.
- Seek assistance from the Area Communications Officer.

This ensures good publicity for:

- The Charity
- The Lodge/Chapter Involved
- West Riding Masonic Charities Ltd. and the MCF

REMIND YOUR LODGE/CHAPTER –

Explain the impact it has made on the charity concerned.

Emphasise the total funding your Lodge/Chapter 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 Freemasons are:

- Freemasons are one of the largest donors in the UK to charity.
- 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 Grants totalling over £5 million.
- 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.
- The Ukraine Appeal raised £40k from Festive Board Raffles in May & June 2022 WRMC match funded it, therefore £80k went to the Appeal.
- WRMC has 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 in 2022 raised £20,000 through the generosity of local masons.

APPENDIX 3

West Riding Masonic Charities Ltd. (WRMCL)

We are one of a handful of Provinces in the UK that has an Independent Registered Charity, West Riding Masonic Charities Ltd. (WRMCL). It started in 1828 and in 1945 it became a Limited Company. It has a board of directors, co-opted directors and assisting members. WRMCL operates in 3 areas:

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



The West Riding Masonic Care and Support Fund provides short term help and support to West Riding Freemason, their families or dependants when they are:

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

It is a confidential service that can respond within 24 hours and has a 3-day resolution target. It can be accessed by:

1. Lodge/Chapter Almoner
2. Provincial Almoner
3. Confidential Telephone Helpline (0344 902 0220)
4. E-mail: helpline@wrprovince.com

The Team has 3 trained specialist Care & Support Officers who provide advice and arrange the appropriate support. Examples of assistance include the provision of essential home furnishings & equipment; minor home adaptations; repairs & maintenance; health; social; respite & convalescent care.

One of the Care & Support Officers, Claire Beaumont spends time with brethren or their families ensuring that the correct benefits/allowances are claimed e.g., Attendance Allowance, Carers Allowance and Personal Independent Payments, etc. Since she started in 2022, she has assisted brethren and their families to claim of over £1.5 million in benefits/allowances that are not a one-off payment, they are for life.

WRMCL and the Masonic Charitable Foundation complement each other, as MCF provide longer term and ongoing financial support to our brethren and families.

2. Teddies for Loving Care (TLC)



TLC started in 2001 by Freemasons in the Province of Essex, to provide comfort to distressed children receiving treatment in hospital Accident & Emergency Units, Trauma Centres or Air Ambulances. An injured child receives a TLC 'Teddy' to help reduce the trauma, especially before treatment. For example, if they are to receive an injection or have a bandage applied, the staff members inject or bandage the teddy to show the child that it does not hurt.

In our Province we started the Scheme in 2007 and are very proud to say over 200,000 Teddies have been provided to 17 A&E facilities, across our Province.

Over 3 million Teddies have been distributed nationally. Our scheme is administered by Keith Bradley who is able to provide a large Teddy for Lodges/Chapters to raise funds for TLC.

3. West Riding Masonic Community Fund (WRMCF)

(Formerly Provincial Grand Masters Fund (PGMs Fund))



Created in 1987 as the Provincial Grand Masters Fund to enable WRMCL to make grants to non-masonic community organisations and charitable institutions in the Province of Yorkshire, West Riding. It rebranded its name to the current West Riding Masonic Community Fund in 2023.

Local Freemasons can choose by voting on a proposition in open Lodge/Chapter to apply to the WRMCF Fund to sponsor a suitable project for a 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 grants are considered twice a year with the closing date for applications being 28th February and 31st August. The amount available for the distribution of major grants is in excess of £100,000. All applications in excess of £5,000 will be submitted as a major grant. These grants are intended to cover applications from particularly worthy causes that need substantial financial assistance. The distribution of the money may be made up of a number of smaller grants or one large grant depending on the number and quality of applications received.

Minor Grants:

These grants can be applied for throughout the year and are considered by the Fund Committee at their regular meetings. Minor grants are intended to be relatively modest in size and able to make a significant difference to the beneficiary. Grants will be awarded for either capital or revenue expenditure. Minor grants may be awarded up to a maximum of £5,000 in special circumstances with applications greater than £5,000 being directed to the Major Grants scheme.

Statistics of both Major & Minor Grants

2021 - 2024	Major	Minor	Combined
Value £ of Grants	£449,837	£608,196.18	£1,058,033.18
Number of Grants	21	267	288
Average Value of Grants	£21,420	£1,937	£3,792.33
Total Value Awarded			
Jan 2021 - Dec 2021	£150,728	£184,145.92	£334,873.92
Jan 2022 - Dec 2022	£109,712	£225,584.47	£335,296.47
Jan 2023 - Dec 2023	£189,397	£172,670.62	£362,067.62
Jan 2024 - Dec 2024	£ 57,995	£ 99,855.97	£157,850.97

Statistics of Grants Awarded since March 1986

- Total Minor Grants awarded – 3,806
- Total Major Grants awarded -105
- Total 3,806 Financial Awarded Grants (Major & Minor):

£5,406,842.56

Key Facts about Current Charitable Giving in our Province

- ❖ Currently approximately 50% of members in our Province regularly donate to Masonic Charities.
- ❖ This means that the 50% do not donate.
- ❖ If those members who are NOT contributing donated just £1 per week, it would raise around an additional £2,500 per week (£10,000 per month or £120,000 per year).
- ❖ Gift Aid means that for every £100 donated, £25 can be claimed as Gift Aid.
- ❖ 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:

- Samaritan Fund
- Royal Institute for Girls & Boys
- Grand Charity
- RMBI (Care Homes)

It made sense to incorporate all the Charities under one Foundation, which has helped well over 3,000 masons and their families providing cradle to grave care.

Application can be made direct via the MCF website by charities or individuals.

Unlike WRMCF there are no restrictions on how the money can be used.

It provides support 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 and a free will writing service.

Sign up to their mailing list to receive monthly 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
- 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.

The Province of Yorkshire West Riding has received in excess of £5.5 million from the MCF since 2016. Between 1st April and 30th September 2024 almost half a million pounds was provided to 103 Masons, or their families, by the MCF, who rely on the Festival System to raise much needed funds. Therefore, please help our Brethren and Companions in need by supporting the Yorkshire West Riding 2028 MCF Festival.

MCF 2022 'A YEAR IN BRIEF'

- £12.7M - awarded through 4,297 grants to individuals or households of which £7.4M was awarded to help with essential daily living costs.
- £4M was awarded to help with health, care and wellbeing needs.
- £1.3M was awarded to help children and young people in education.
- £6.7M to support RMBI Care Co. residents with the cost of their care, in addition, 1,038 visits to applicants completed by 340 trained volunteers.
- 13,884 enquiries were received from people seeking support.
- £1.2M was given to disaster relief efforts.
- £6.8M awarded to 451 charities.

MCF Case Studies

1. Bro Johnny Spencer (*spinal surgery*) - Suffered chronic back pain since 2011. When things became so bad that he had to crawl up the stairs. Numerous visits to various NHS facilities proved had proved unsuccessful he therefore researched his condition, as scans in 2019 had revealed he had a ruptured disc resulting in major compression on the nerves leaving the spinal cord. NHS had told him that his only option was to have screws and rods fitted to secure his back which he decided was not an option. He was eventually referred to one of the UK's leading surgeons who had pioneered groundbreaking surgery; however, it was only available privately. Jonny contacted the MCF and within a day he had been given emergency funds to cover the cost of an initial consultation with the surgeon. The MCF then contributed £24,000 (more than 90% to the cost of the surgery), which took place two weeks later and was a complete success. This experience has been life-changing, and he now plans to embark on a major fund-raising event in 2025 to raise funds in support of the 2028 Yorkshire West Riding MCF Festival.
2. W Bro. Andrew Simpson (*knee replacement surgery*) – A brother from Thorne, South Yorkshire, was listening to a talk on Charity from the Provincial Charity Steward and when it came to Jonny Spencer's story Andrew stood up, assisted by two walking sticks and explained that the MCF had funded his knee replacement surgery a matter of weeks earlier.
3. A Brother from a Halifax Lodge (*heart bypass surgery*) – was diagnosed with a heart condition but faced a wait of at least six months for surgery. His health was deteriorating and was out of breath all the time and extremely tired. He was literally plodding along but struggling. After the operation the surgeon commented that if he had waited a further six more months, he would not have survived. Until then, they had not realised how bad his heart condition truly was.
4. Claro Enterprises, Starbeck, Harrogate – A charity that provides woodworking opportunities and training for those with mental health conditions. The charity received a £15,000 grant when the Festival launched in order to set up an accreditation scheme. The scheme is now fully up and running and the first awards will be in Spring 2025.
5. In February 2022, the MCF awarded a total of £541,000 to medical research, working with four partners to fund seven new PhD studentships under the theme of degenerative diseases. Locally our University of Bradford Institute of Cancer Therapeutics received funding for PhD scientists' cutting-edge research into camouflaged drug treatments for prostate cancer. Other funding included partnering Alzheimer's Research UK, British Heart Foundation, Diabetes UK. By nurturing the talent of young scientists and providing the funding necessary for them to become experts in their fields, Freemasonry is enabling the research breakthroughs of tomorrow.

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?

A. 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/Chapters 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/Chapters 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

- 170 Craft Lodges in the Province, in 45 Towns & 5 Cities with almost 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.
- The Province is divided into 5 Areas:

AREA 1: *APGM: Fraser McPherson* PCC Chair: Chris Binns

Consists of 14 Masonic Meeting Places in: Haworth, Keighley, Bingley, Baildon, Bradford, Dewsbury, Mirfield, Cleckheaton, Heckmondwike, Morley, Pudsey and Batley.

AREA 2: *APGM: Robert Cole* PCC Chair: Gerald Dickinson

Consists of 15 Masonic Meeting Places in the Pennine area which covers the significant conurbations of Huddersfield, Halifax and Brighouse. They extend from Todmorden and Uppermill in the West, Hipperholme on the Northern boundary, Brighouse in the East and Holmfirth to the South.

AREA 3: *APGM: John Vause* PCC Chair: Mike Wrigglesworth

Consists of 13 Masonic Meeting Places in: Barnoldswick, Bentham, Guiseley, Harrogate, Ilkley, Knaresborough, Otley, Pateley Bridge, Ripon, Settle, Skipton, Waddington and Wetherby. 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: *APGM: Chris Allen* PCC Chair: Robert Jenkins

Consists of 13 Masonic Meeting Places in: Barnsley, Doncaster, Thorne, Goole, Bawtry, Swinton, Rotherham, Penistone and Sheffield (22 Lodges meeting at Tapton Hall). 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: *APGM: Malcolm Whiteley* PCC Chair: Mathew Sims

Consists of 7 Masonic Meeting Places in Leeds, Castleford, Pontefract, Wakefield. 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 2 & 3, Role of Charity Steward)

Every Lodge/Chapter should have a Charity Steward Agenda Item on their summons, for the 'Charity Steward Report' to update on Charity developments.

The monthly Charity Steward's report is to keep members up to date on latest charity news from PGL and UGLE. It also provides an opportunity to discuss the wider issues of charity. Below is a list of items that Lodge/Chapter brethren may find interesting.

USEFUL ITEMS

- The Masonic Charitable Foundation (MCF)
- The Festival System – If in Festival, provide monthly update.
- The Role of Charity Steward
- The Role of the PCA
- West Riding Masonic Charities Limited
 - a) West Riding Masonic Care & Support Fund (WRMC&SF)
 - b) West Riding Masonic Community Fund (WRMCF)
 - c) Teddies For Loving Care (TLC)
- How to measure Success (Appendix 8 below)
- Headline Facts & Figures
- Own Lodge/Chapter Successes
- Gift Aid
- Making A Will (See MCF Web Site for details – www.mcf.org.uk)

APPENDIX 8

MEASURING SUCCESS

Understanding Metrics used to measure success is extremely important to ascertain how you, your brethren and your Lodge/Chapter is performing against charitable giving.

One of the main ways of quickly measuring success is the amount of money collected annually; however, this can be further analysed by using other factors, such as:

- Number of Members 'Regularly Giving'
- Number of Members signed up for 'Gift Aid'
- Support Provided to Almoner
- Amount donated to WRMCL
- Amount donated to MCF
- Number of donations to Charities (Locally)
- Number of Presentations made by Charity Stewards
- Number of Meetings attended by Charity Stewards/PCA's
- Number of Grants applied for, to WRMCL
- Number of Successful Grants awarded by WRMCL
- Publicity Generated by Lodge/Chapter relating to 'Charitable Giving'

APPENDIX 9

EXAMPLE LETTER – CHARITY STEWARD

Address line 1

Date

Ref: ***Regular Charitable Giving***

Dear Brother

I am very proud and honoured to be your Charity Steward as Charity is the bedrock upon which masonry is founded.

The reason I joined masonry is for friendship and helping charity. I regularly reflect on those memorable 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 about half of all brethren in the Province regularly donate to Masonic Charities and this same figure is reflected in our Lodge/Chapter giving. If those brethren who are not giving, donated just £1 per week, it would raise around an additional £2,500 per week (£10,000 per month or £120,000 per year).

Our Lodge/Chapter in recent years has enjoyed many successful grants from the WRMCL Community Fund for local Charities, *examples of grants totalling over £??,000.*

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

Most members make charitable donations by Standing Order; on either a monthly, quarterly or annual basis. 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, as it 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