

# **THE FREEMASONS GRAND CHARITY RELIEF CHEST & GIFT AID ENVELOPE SCHEME**

## **IMPORTANT INFORMATION FOR LODGE ALMONERS & CHARITY STEWARDS**

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## 1. INTRODUCTION

To date, the Warwickshire Mark Benevolent Fund (**WMBF**) supporting Freemasons and their Dependents 'In Need' and supporting Non-Masonic and Masonic Charities, have used specially printed Gift Aid envelopes in order to obtain the tax relief benefit on donations made by Lodge Members and friends. The processing of the Gift Aid envelopes has been a significant administrative and costly task for the Warwickshire Mark Charity Steward and Treasurer. To reduce the administrative burden and related costs we have undertaken a review of how best operate a Gift Aid Scheme.

## 2. THE WAY FORWARD - THE NEW SYSTEM

A Relief Chests operated by The Freemasons' Grand Charity (**FGC**) on our behalf has been created numbered **MMM2112** for the **Warwickshire Mark Benevolent Fund**.

The administration of the envelope scheme will be undertaken on the Benevolent Fund's behalf by the **FGC** based at Freemasons Hall, Great Queen Street, London. The new Gift Aid scheme will commence as of a date to be notified in 2016 and will involve use of the **FGC** generic Gift Aid envelopes, and Envelope Verification Schedules (**EVS**). The **EVS** is a form which is sent to **FGC** with each batch on Gift Aid Slips. The **EVS** will require the fund's name and registered relief chest number.

A number of Lodges as well as the Craft, Royal Arch and other Mark Provinces already use Relief Chests, and are therefore familiar with the proposed operation.

**EVS** forms will be made available by two methods.

- (1) They will be sent by email to all Charity Stewards for printing and completing by hand.
- (2) A copy will be available on the Warwickshire Mark website that can be completed on-line before printing out.

The Lodge Charity Steward (or other Lodge representative) will complete the details required on the form. This form together with the completed Gift Aid Slips (detached from the Gift Aid Envelopes) and a Lodge cheque (payable to the **Freemasons' Grand Charity**), is then sent to the FGC. **NOTE – NOT to the Warwickshire Mark Charity Steward or Almoner** as has previously been the case.

The funds will be held by the FGC on our behalf, until disbursement at appropriate periods.

The Lodge representative who completes the **EVS** will receive either a printed or an email receipt from the **FGC**. To enable the Provincial Grand Charity Steward to also monitor the system it will be necessary for the Lodge Charity Steward to advise him of amounts sent to the FGC.

The simplest way of sending this information is by copying the schedule, and emailing or posting it to the Provincial Charity Steward. If the schedule is completed digitally, it will be much simpler to email to the Provincial Charity Steward.

Examples of the envelopes and envelopes verification schedules are attached for information.

### 3. ADVANTAGES OF THE NEW SYSTEM

- 1) Processing of Gift Aid envelopes is handled entirely by the **FGC**, at no cost to the Province.
- 2) A much better rate of interest is received, both on deposits and on monthly reclaimed Gift Aid.
- 3) Envelope Verification Schedules are overprinted where required with **WMBF** and Charity Chest numbers, again at no cost to the Province.
- 4) On-Line access to Relief Chest details is available to the Province, to verify incoming donations and balances. Reports are freely available from the system.
- 5) The new system is simpler for Lodges to use as there is only one envelope in use, and instead of having to send written instructions with the envelopes a simple schedule will be used to accompany the tear-off Gift Aid slips to the FGC and an email confirmation sent to the Provincial Charity Steward.

### 4. SUBMISSION OF ENVELOPES

The tear-off slip on the Gift Aid Envelope must be completed by the donor and then inserted in the envelope with either a cash or cheque donation. To qualify for gift aid, the envelopes must be completed personally, and the following sections are completed in **the same ink**:

- 1) First name and surname
- 2) House name/number and postcode
- 3) Amount of donation
- 4) Date of Donation
- 5) **Tick the relevant box – this is vital on the first occasion as without a tick the gift aid will not be applied.** After the first occasion, the instruction is continued automatically.

The Almoner / Charity Steward (or nominee) counts the contents of all envelopes and ensures that each donation agrees with the amount on the slip. It is preferred that the opening of the envelopes and recording of the donated amount is undertaken by at least two Brethren. The total funds are banked into the Lodge Charity Account and the EVS is completed. A copy of the schedule is taken and emailed to the Provincial Charity Steward. (Please use [r.n.clemson@sky.com](mailto:r.n.clemson@sky.com))

If preferred, a summary within an email or posted would suffice.

A cheque is raised payable to **“The Freemasons Grand charity”** for the total amount.

The cheque, envelope and all the tear-off slips are sent to the **Relief Chest Scheme, Freemasons Grand Charity, 60 Great Queen Street, London WC2B 5AZ.**

They should **NOT** be sent to the Warwickshire Mark Provincial Charity Steward or Almoner.

## **5. ARRANGEMENTS FOR IMPLEMENTATION**

Quantities of the FGC envelopes will be sent to nominated members at each location in the Province, together with a small number of the EVS forms. The members will be asked to ensure that all old Warwickshire Mark Benevolent Fund envelopes are withdrawn. Any Almoners/Charity Stewards or Lodge members holding any of the old envelopes are asked to destroy them as they cannot be used in future. Once the system is implemented – in 2016 – the schedules will be available to all via the website.

Any queries on this procedure should be directed to the Provincial Charity Steward either on 0121 705 9162 or 07968019073 or [r.n.clemson@sky.com](mailto:r.n.clemson@sky.com)

Nigel Clemson  
Provincial Grand Charity Steward

## **CHECK LIST FOR THE HANDLING OF GIFT AID ENVELOPES AND ENVELOPE VERIFICATION SCHEDULE**

**1. The tear-off slip on the Gift Aid Envelope must be completed by the donor and put inside the envelope with the cash or cheque donation. If the donation is to be gift-aided, the envelopes must be completed personally, and all the following sections completed in the same ink:**

- \* **First name and surname**
- \* **House name or number and postcode**
- \* **Amount**
- \* **Date of Donation**
- \* **Tick the relevant box**
- \* **The Charity Chest number should be entered**

**2. The Lodge Almoner and/or Charity Steward/Treasurer or another member should count the contents together and make sure that it agrees with the amount entered on the slip.**

**3. The money is banked into the Lodge's Charity bank account.**

**4. An Envelope Verification Schedule is completed – either digitally or in paper form provided by the Provincial Charity Steward. A copy of the schedule is kept, either on paper or digitally to be forwarded to the Provincial Charity Steward.**

**5. The Treasurer/Almoner/Charity Steward draws a Lodge Charity account cheque made payable to "The Freemasons Grand Charity".**

**6. The cheque, Envelope Verification Schedule and all the tear-off slips are sent to The Freemasons Grand Charity, 60 Great Queen Street, London WC2B 5AZ. The envelope portions are not required and can be discarded.**

**7. The copy kept at 4 is sent either by email by scanning the copy, or by post, or if held digitally by attaching to an email to the Provincial Charity Steward using email address [r.n.clemson@sky.com](mailto:r.n.clemson@sky.com)**

\* **If the Envelope Verification Schedule is for the WMBF, then no further action is necessary.**

\* **If for some other purpose Mark Benevolent Fund (Towards a Patrons Jewel, then a note needs to be added to indicate what the donation is for.**

**If there is no indication, it will be applied to the four non-Masonic charities.**

\* **If the copy is to be sent by post, it should be addressed to the Provincial Grand Charity Steward,**

With thanks to John Hayward and the officers of the Warwickshire Craft Charity Office