

Supreme Order of the Holy Royal Arch

*Provincial Grand Chapter of
Warwickshire
Benevolent Fund*



**The Freemasons' Grand Charity
Relief Chest and
Gift Aid Envelope Scheme**

Issue 2018 (rev1)

**THE MASONIC CHARITABLE FOUNDATION
RELIEF CHEST AND GIFT AID
ENVELOPE SCHEME**



**IMPORTANT INFORMATION FOR CHAPTER
CHARITY STEWARDS AND ALMONERS**

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1. INTRODUCTION:

The Provincial Grand Chapter of Warwickshire Benevolent Fund (**PGCWBF**) which supports Non-Masonic Charities, previously used specially printed Gift Aid envelopes in order to obtain the tax relief benefit on donations made by Companions and friends. The processing of the Gift Aid envelopes was a significant administrative and costly task and therefore to reduce the burden and related costs we undertook a review of how best to operate a Gift Aid scheme. The new scheme was introduced in September 2015.

2. THE WAY FORWARD - THE NEW SYSTEM

A Relief Chest operated by The Masonic Charitable Foundation (**MCF**), (formally Freemasons Grand Charity), was created for the **PGCWBF** on behalf (numbered **E0135**).

The administration of the envelope scheme is now undertaken on the Province's behalf by the **MCF** based at Freemasons' Hall, Great Queen Street, London. This new Gift Aid scheme involves the use of the **MFC** generic Gift Aid envelopes and Envelope Verification Schedule (**EVS**). The **EVS** is a form which is sent to **MFC** with each batch of Gift Aid Slips. The **EVS** is appropriately overprinted with the fund name and registered charity number.

Chapters obtain (**EVS**) forms in several ways as indicated below.

The Chapter Charity Steward or (other representative) completes the details required on the form. This form together with the completed Gift aid slips, which have been detached from the Gift Aid envelopes, and a cheque for the total of the donations is then sent to the **MCF**

NOTE – this must not be sent to the Warwickshire Provincial Charity Office nor to the Provincial Grand Charity Steward or the Provincial Grand Almoner, as was previously the case.

The funds are held by the **MCF** on our behalf, earning credit interest, until disbursement at appropriate periods to Warwickshire Charities as agreed by the Trustees of the Charity.

The **MCF** generic form of Gift Aid envelopes are available in plentiful supply in all Masonic centres, and are used by both Lodges and Chapters whenever charitable collections are Gift Aided through the Relief Chest scheme. The same envelopes are, therefore, used by both Royal Arch and the Craft and it is stressed that the funds are directed by The Masonic Charitable Foundation to the intended Relief Chest by correct use of the Envelope Verification Schedule form (**EVS**) which, for collections on behalf of the Provincial Grand Chapter of Warwickshire Benevolent Fund will specify the correct Royal Arch Relief Chest.

The **EVS** forms are made available by three methods.

- (1) They are downloadable from the Royal Arch Provincial website.
- (2) They are available from The Provincial Grand Charity Steward by e-mail upon request.
- (3) A small supply are kept at each meeting place. However, so are similar **EVS** forms for Craft use! Please be sure to take the correct one.

The Chapter Officer who completes the **EVS**, usually the Charity Steward or Treasurer, receives from **MCF** a receipt by post.

To enable the Provincial Grand Charity Steward to monitor the system it is necessary for the Chapter Charity Steward to advise him of amounts sent to the **MCF**. The simplest way of sending this information is by copying the **EVS**, and emailing it directly to him. If preferred, a summary within an email would suffice.



3. ADVANTAGES OF THE RELIEF CHEST SYSTEM

- 1) Processing of Gift Aid envelope slips is handled entirely by the **MCF**, 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 with **PGCWBF** fund details, and Charity Relief 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 system is much simpler for Chapters to use as:
 - there is only **one envelope** in use by both the Royal Arch and Craft. Therefore it is in plentiful supply.
 - Both cheque and donation slips are sent together (with the **EVS**) to one address (instead of cheque to one address and envelopes to another as with the previous system)
 - The Chapter receives a formal receipt by post confirming the amount received and the recipient Fund.

4. SUBMISSION OF DONATION SLIPS

To claim Gift Aid 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 tear-off slips must be completed personally, and the following sections 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 Chapter Almoner / Charity Steward (or nominee) counts the donations made in all the envelopes and ensures that each donation agrees with the amount on the slip. It is desirable that the opening of the envelopes and recording of the donated amounts is undertaken by at least two Companions.

The total funds collected are banked into the Chapter Charity Account and the **EVS** completed. A copy of the **EVS** is then taken and emailed to the Provincial Grand Charity Steward at charitystwd@royal-arch.org.uk. If preferred, a summary included within an email would suffice.

A cheque is then raised for the total amount. Currently payable to “**The Freemasons’ Grand Charity**”. This is expected to alter to “**The Masonic Charitable Foundation**” in due course. The cheque, **EVS** and all the tear-off slips are sent together to the:

**Relief Chest Scheme,
The Masonic Charitable Foundation,
60 Great Queen Street,
London
WC2B 5AZ.**

They should **NOT** be sent to the Warwickshire Provincial Charity office, nor to the Provincial Grand Charity Steward, or the Provincial Grand Almoner.

The companion responsible for the account on which the cheque is drawn completes the **EVS** form so that it is he who receives the receipt from **MCF**. He will need it to support his report at the end of the financial year. Should he discover a discrepancy with the receipt, he is to immediately inform the Provincial Grand Charity Steward who will take the matter up with **MCF**. If possible, send or email a copy of the receipt to the Provincial Grand Charity Steward.

Under no circumstances should a Chapter representative make direct contact with MCF. If found necessary, the **MCF** will issue an amended receipt.

5. FINAL NOTES

Envelopes should be distributed to all present irrespective whether able to claim Gift Aid or not, and all wishing to use the envelope to make their donation to do so. Those unable to claim Gift Aid simply leave the declaration slip blank.

Any queries on these procedures should be directed to the Provincial Grand Charity Steward:

E.Comp. Howard Smith
Moor Ash Farm,
Bodymoor Heath,
Sutton Coldfield
B76 0EE

Tell: 01827 872537
e-mail: charitystwd@royal-arch.org.uk

6. PROVINCIAL GRAND CHAPTER OF WARWICKSHIRE BENEVOLENT FUND

During the last twelve months the Fund has completed its £28,000 commitment to supporting Crossroads, Coventry Stars Club. The Management Committee of the Fund has recently accepted the Trustees recommendation that up to £25,000 be donated to a School for children with profound learning difficulties. This donation will enable the School to install Rebound Therapy Equipment in a building being specially adapted for that purpose. It is expected that our donation will be made in two tranches, one before the end of this year and the other next year. We have already received some publicity through a recent article in the Sutton Coldfield News.

The President, Management Committee and Trustees of the Fund hope that all Chapters will consider continuing their support of the Benevolent Fund by dedicating at least one of their charity collections over the year to it.

E. Comp David C Mander PGStB,
Secretary/Trustee of the PGC of Warwickshire Benevolent Fund
Tel: 01676 522362 email: davidandlibby@whitestitch.co.uk

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CHECKLIST FOR HANDLING OF GIFT AID ENVELOPES AND ENVELOPE VERIFICATION SCHEDULE.

1. The envelope tear-off slip must be completed by the donor and put in the envelope with cash or a cheque.

2. If the donation is to be gift aided, details on the tear-off slip must be completed personally – in the same ink. The details required are first name, surname, house name or number, amount £, date and tick in the relevant box. The Charity Relief Chest number can be entered - E0135 - but this is not necessary as the Envelope Verification Schedule is the controlling document.

3. The Chapter Charity Steward and/or Almoner or Treasurer or another Companion should count the contents together and make sure they agree in each case with the amount entered on the slip.

4. The total is then to be banked in the Chapter charity bank account.

5. An envelope verification schedule is completed. This form is available for download on the Provincial website, by email from the Provincial Grand Charity Steward upon request and a small stock is available at each meeting place. Other similar forms are also kept at each meeting place – be sure to take the correct one! A copy must be kept to be forwarded to the Prov.G.Ch.Stwd.

6. The Chapter Treasurer or other authorised officer draws a cheque on the Chapter Charity bank account which must be made payable to “The Freemasons’ Grand Charity”.

7. The cheque for the total amount, Envelope Verification Schedule, and the tear-off slips, are then all to be sent to The Masonic Charitable Foundation at 60, Great Queen Street, London WC2B 5AZ. Envelope portions can then be discarded

8. The copy (referred to at No 5 above) must be forwarded (post or email) to the Provincial Grand Charity Steward. It will suffice to include a summary of the details in an e-mail to the Provincial Grand Charity Steward at charitystwd@royal-arch.org.uk If sent by post: To Fred Ditchfield, 16 Le More, Four Oaks, Sutton Coldfield, West Midlands, B74 2XY.

This checklist and notes for Chapters only relate to donations made to the Provincial Grand Chapter of Warwickshire Benevolent Fund as indicated in the preceding information sheets to which this is attached.

The Relief Chest Gift Aid Envelope Scheme Guidance Notes

1. The tear-off slip on the Gift Aid Envelope must be completed by the donor and then put inside the envelope with the cash or cheque donation.

If the donor wants the donation to be Gift Aided and does not have a previous declaration they must complete the envelope themselves ensuring that the following sections are completed in the same ink

- First Name and Surname
- House Name or Number and Postcode
- Amount of donation
- Date of the donation
- Tick the relevant box

Please make sure that the envelopes are not completed by anyone other than the donor himself, including the Representative.

2. The Charity Steward and/or Treasurer (preferably both together) count the contents from each envelope and make sure that it agrees with the amount entered on the tear-off slip.



3. The money is banked into the Lodge/Chapter bank account and the Envelope Verification Schedule is completed.

4. The Charity Steward or Treasurer draws a cheque made payable to “The Freemasons’ Grand Charity” for the total amount.

5. The Cheque, Envelope Verification Schedule and all the tear-off slips are forwarded by post to The Freemasons’ Grand Charity.

For more information on the new Gift Aid guidance, please see:

<http://www.hmrc.gov.uk/news/new-guid-giftaid.htm>

For general information on Gift Aid, please see

<http://www.hmrc.gov.uk/individuals/giving/gift-aid.htm>