



# MASONIC CHARITY FOUNDATION OF OKLAHOMA



P.O. BOX 2406 EDMOND, OKLAHOMA 73083-2406 (405) 348-7500 fax (405) 348-9031  
e-mail: [mcfok@sbcglobal.net](mailto:mcfok@sbcglobal.net) web: [mcfok.org](http://mcfok.org) toll free: 1-877-562-7667

# Kit FOR THE BUSY LODGE SECRETARY



**M**ASONIC CHARITY FOUNDATION  
OF OKLAHOMA

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February 2010

**Dear Brother,**

We know you have a lot to do. At the Charity Foundation, we're trying to make your work as simple and fast for you as we can when it comes to Matching Fund requests.

This kit pulls together information, sample forms, and background materials. We want to make the whole process as clear and as un-mysterious as possible.

If you have suggestions of ways in which we can make things easier and better for you and your Lodge, please let us know. We're always looking for ways to improve things.

Masonic Charity Foundation of Oklahoma  
Edmond, Oklahoma



## *It's a Very Big Deal!*

Sometimes we forget just how important Masonic Charity is, or how vital a role you play in it. But we can all be proud of what we accomplish. That's especially true of you, because your processing of forms and requests makes the whole thing work.

Of all charities designed to help individuals:

*Masonic charity is the **oldest** still-existing private philanthropy in Oklahoma.*

*Masonic charity is the **largest** private philanthropy in Oklahoma.*

*Masonic charity **touches more lives** than any other private philanthropy in Oklahoma.*

*Masonic charity **meets a wider range of needs** than any other private philanthropy in Oklahoma.*

*Masonic charity is **available in more areas of the State** than any other private philanthropy in Oklahoma.*

*The Matching Funds Program provides your Lodge the opportunity to help meet the needs of your town and of non-Masons (**Community Matching Funds**) and the needs of members of the Masonic family (**Promises Matter Matching Funds**). In this KIT, you will see how to access both of these funds for the charitable projects of your Lodge.*

*Thank you for your efforts to make Masonic compassion real in the lives of others.*

*The Masonic Charity Foundation of Oklahoma*

# Answers to Frequently-Asked Questions

## Why do we have a Matching Funds Program in the first place?

Long before there were other charities "out there," Masons were helping people, so it's not surprising that we have a commitment to charity. But just as many people "fall through the cracks" in various governmental programs, they can fall through the cracks in charitable programs, too. It's hard for state-wide organizations to meet local needs. That's where your Lodge comes in. **You can find the local human needs and opportunities and help to meet them.** And we want to help you do that. The Matching Funds Program is our way of making charity personal.

## How do we request Matching Funds?

Simply fill out a Matching Funds application and mail it to us. Visit our website to obtain a fill-able form: [www.mcfok.org](http://www.mcfok.org) Simply click on "on-line forms" & scroll down to "Matching Funds Application Form". Remember to complete the box on page 1 if the application is for a Master Mason, wife, widow or mother of a Mason, minor child or female member of the Order of the Eastern Star. Or, call our office to request a form be mailed directly to your Lodge: (405)-348-7500 or toll-free 1-877-5-MASONS. (1-877-562-7667)

## What happens in the Foundation office when a request is received?

All completed applications will be voted on by the Matching Funds Committee.

**But PLEASE, try not to create emergencies unnecessarily. We'll do our best to accommodate, but it works better for everyone if you make application far enough in advance to give us about 14 days.**

## What is this Committee and what do they do?

It's called the **Matching Funds Committee**. It's made up of Board Members of the Masonic Charity Foundation.

They vote on all applications. There are several members of the Committee. An application must receive a majority of "YES" votes in order to be payable.



## Do applications get turned down?

The great majority go right on through with no problem at all. Sometimes, we have to contact the Lodge and ask for more information. (We'll talk about how to avoid that in the section titled **FAST TRACK APPLICATIONS**.) In a few cases, the Committee will decide that an application doesn't fit the rules (see **A FEW RULES**.) In that case, we'll notify the Lodge that we can't match funds on that request.

## Is there any way to tell in advance which applications may get turned down?

You can get a pretty good idea. Take a look at **A FEW RULES**, and also at **PARTNERSHIPS**. But there's no way to make certain in advance. The reason is that some things which look on the surface as if they don't qualify may turn out to. Look at the section of this material titled **SHADES OF GREY**.

**If you're not sure something will qualify CALL US IN ADVANCE AND ASK. WE'LL TRY TO WORK WITH YOU.**

We hope this information will help make your application process faster and easier and less frustrating. Remember, we're all Masons together, working for the same goals.

**CALL US  
if we can help with information or in any  
other way. WE WANT YOUR PROJECTS TO  
SUCCEED.**

**(405) 348-7500  
Toll Free: 1-877-5-MASONS  
(1-877-5 6 2 7 6 6 7)**

**Service is our only reason for existence.**

**Helpful Suggestion When Advertising Your Fundraiser:** Remember, the public isn't going to know the Masons are helping when you call yourself *Hope Lodge #601* in your advertising. You will get more recognition if you publicly refer to yourself as ***Hope Masonic Lodge***.

# A FEW RULES

## Why do we have to have rules in the first place?

It's a fair question. We have rules mostly because of the I.R.S. It's important that we keep our status as a tax-exempt Foundation. That way, money people give us is deductible for them and we don't have to pay income tax on the money earned by the Endowment Fund. In order to keep that status, we have to play by their rules. A few of the rules don't come from the I.R.S., but they are rules to insure that Lodges have an equal opportunity to get Matching Funds and that the projects reflect well on the fraternity.

## Is there a minimum amount?

The MINIMUM amount the Foundation will consider is a request for \$25--total gift of \$50 including matching funds. Total amounts of less than \$50 are just too small to do anyone any good. We should give at least \$50 to a project if it is worth supporting.

## How can the money we want to match be raised?

There are three basic ways that money can be raised and be eligible for Matching Funds.

- \*The Lodge can vote the money out of its treasury.
- \*The Lodge members can "pass the hat."
- \*The Lodge can hold a fund-raiser.

The first two are obvious, but the third one is not quite so clear.

If the Lodge solely holds a fund-raiser -- a garage sale, a pancake dinner, there's no question that the funds qualify for matching. Or, if the Lodge puts out mason jars on the counters of local stores, with a sign which says something like "ABC Masonic Lodge is raising funds to support Little League, Please Help" the funds so raised are eligible for Matching Funds.

Or a Lodge can work with some other organization to raise money for a project. See the section marked **PARTNERSHIPS**.

**But some sources of money do not qualify.** Funds you receive from some other Masonic organization or foundation do not qualify for matching. There is nothing to keep you from accepting such funds for your own charitable use, but they cannot be matched.

You cannot match funds raised by means which are contrary to Oklahoma Masonic law or Oklahoma state law. **This includes poker, poker runs and casino nights unless a license or permit has been obtained from the ABLE Commission.**

Also, money can't be "laundered" through the lodge in order for a person or an organization to "double" their money. (See page 15 – Strings Attached)

## Are there projects which won't qualify?

There are a few. Remember that the purpose of the program is to support activities which are charitable, educational, or make a contribution to the welfare of others.

**\*Celebrations do not qualify**, if the purpose is simply a celebration. For example, if a Lodge wants to give funds to the community to help fund a fireworks display for the 4th of July the Lodge can do so, but cannot apply for Matching Funds.

**\*Contributions for sectarian purposes do not qualify**. Thus, funds to send a child to a church camp or on a mission trip would not qualify unless the purpose of the camp or mission trip is non-sectarian. If, for example, it is a camp for handicapped children of all faiths which just happens to be run by a church, it probably would qualify.

**\*Contributions to the Chamber of Commerce do not qualify**, since the purpose of the Chamber of Commerce is commercial, not charitable.

**\*Contributions to commercial enterprises do not qualify**. Giving money to some local store to help get it "over the hump" will not qualify for funds because the purpose is not charitable or educational.

**\*Contributions to support or create monuments or war memorials** are not eligible for Matching Funds.

**\*Projects to benefit the Lodge do not qualify**. It's a matter of law, again. If the Lodge needs a new roof or new carpeting or some such thing, Matching Funds can't be used.

**\*Money used to purchase ads does not qualify**, unless the ad is to support any type of a youth organization such as Rainbow, DeMolay, Job's Daughters, Boy Scouts, Girl Scouts, youth softball teams, etc.

**\*Contributions to other Masonic organizations, foundations, etc. will not qualify for matching**. The only exception is contributions made by your Lodge to the Youth Orders.

**\*Meals do not always qualify**. Some policy of restricting Matching Funds for meals has been in place from the beginning of the Matching Funds program, because the Fraternity is so centered around Lodge *fraternal* dinners. If meals are for a **charitable** or **educational** endeavor, and are served at a location other than the Lodge building, they possibly qualify for Matching Funds.

**\*Capital improvements**. Improvements to properties not owned by a 501 (c) (3) organization are not eligible for Matching Funds.

But many things fall into a grey area. For example, a program to teach fireworks safety to children as part of a 4th of July program probably would qualify. **BE SURE TO READ THE SHADES OF GREY SECTION** for a few other sources of funds which won't qualify.

## **Are there any general guidelines for things which will qualify?**

Yes, but note that the word IS "GENERAL."

**Matching Funds** are available to every Oklahoma Lodge to help it meet both its fraternal obligation & community needs.

**Promises Matter Matching Funds** helps meet the fraternal needs. Monetary contributions from a Lodge to any needy Oklahoma Master Mason, wife, widow, mother of a Mason, minor child or female member of the Order of the Eastern Star are eligible for assistance through the Promises Matter Matching Funds program.

**Community Matching Funds** can meet many diverse needs such as:

**\*Programs which are sanctioned by the schools** will generally qualify. Thus contributions for band uniforms, athletic equipment, etc. are generally OK.

**\*Programs which aid in education** such as Adopt a Teacher, Adopt a Class, Literacy programs, scholarships, library books, etc. qualify.

**\*Programs which help someone in need** generally qualify. Assisting with utility bills, medical expenses, special equipment such as wheelchairs, or walkers would qualify, as would food kitchens, shelters, etc.

**\*Community cultural or educational events or programs** usually qualify.

**\*Programs which benefit the youth** generally qualify, such as support for Little League, etc.

**\*Programs which benefit the elderly**, such as senior citizen centers, meals on wheels, transportation, etc. generally qualify.

**\*Programs which are of public benefit**, such as equipment for volunteer fire departments, generally qualify.

**\*The following organizations or items are also eligible for Matching Funds:** Masonic Service Association, Prevent Blindness Oklahoma and the Payne Education Center. Also, due to a change in the state law, money raised by a raffle is also eligible for Matching Funds. However, you cannot match funds raised by means which are contrary to Oklahoma Masonic law or Oklahoma state law. This includes poker, poker runs and casino nights unless a license or permit has been obtained from the ABLE Commission.

***AND THERE ARE MANY OTHERS: CALL US IF THERE IS ANY DOUBT***

# **FAST-TRACK APPLICATIONS**

**Everyone wants their application for Matching Funds to go through quickly and with as little hassle as possible.**

We want that, too.

There are a few things you can do to make sure it happens.

**1. Make sure the project qualifies for Matching Funds.** See the RULES section of these materials.

**2. Make sure the source of funds qualifies for Matching Funds.** See the RULES section.

**REMEMBER, BOTH THE PURPOSE AND THE SOURCE OF FUNDS MUST FIT THE RULES.**

**IF THERE IS ANY DOUBT,  
PLEASE CALL THE CHARITY FOUNDATION  
(405) 348-7500 AND TALK WITH US.  
WE CAN OFTEN HELP YOU FIND A WAY TO MAKE IT  
WORK.**

**3. Give us as much information about the project as possible.** The more you tell us, the less likely we are to have to write or call you for more information.

SOME EXAMPLES WHERE MORE INFORMATION WAS NEEDED

**"Band Uniforms"** Did the Lodge pay to have them cleaned? Did you help buy new ones? Were others involved in the project?

**"Camera"** For the highway patrol? For a high school journalism class?

**"Shelter"** A bus shelter? A shelter for battered women? A shelter for the homeless? A lean-to at the side of the Lodge?

**An application which merely said “shelter” would have gone through a lot faster if it had said “Contribution to help establish hot line and shelter for battered children, Oho County Youth Services.”**

**4. Give us information about the source of funds.** If you passed the hat or voted the funds out of the Lodge treasury, tell us. That vote is important because it shows Lodge involvement. If there was a fund raiser, tell us a little about it - held bean dinner, had garage sale, etc.

If the project was a partnership with other organizations, be sure to fill out the partnership part of the application.

**5. Before mailing your application, be sure your application is completely filled out.** This includes attaching copies of fundraising flyers, tickets, newspaper articles, etc. These attachments are necessary, even if your Lodge did this exact fundraising event in a previous year.

**6. Once you have received a Matching Funds check, make sure to fill out and send in the Completion Form as quickly as possible.**

**The Completion Forms are a critical part of our audit documentation. They are the documents we show to the IRS auditors to prove that the funds of the Foundation are being used for charitable or educational purposes which conform to the tax codes. If they are not returned in a timely manner, your Lodge will not have access to the Matching Funds program.**



# FORMING PARTNERSHIPS

**Partnerships are a great way for a Lodge to be active in the community.** Working with others to raise funds to meet community needs or to benefit some unfortunate citizen with a medical emergency, etc., makes the Lodge a player in the community and gets exposure for the Fraternity, as well as meeting a local need.

There are some special considerations in a partnership arrangement.

**1. The purpose must meet the general rules of the Matching Fund program.** You can't get funds for a partnership to do something for which the Lodge could not apply for funds by itself.

**2. It must really be a partnership.** That means that both the Lodge and the Partner must be fully involved with the project. See "What is a Partnership?" below.

**3. Because the purpose of the Partnership Program is to encourage Lodges to work with other, non-Masonic organizations in your town, the Partnership cannot be with another Masonic organization, Order, or Foundation - except for the Youth Orders.**

**4. While most partnerships are between a Lodge and another community organization, it is possible for:**

- 2 or more Lodges to actively work together on a single project to raise money for a charitable or educational endeavor.
- However, each Lodge must actively participate in the planning sessions for the fundraiser. Make certain that each Lodge feels the project is either charitable or educational. Determine the outline of the project and present to each Lodge for a vote.
- Once approved, verify that each Lodge is properly represented in all advertising posters, tickets and news releases.
- Determine how the money will be handled. This is a frequent problem. It is suggested that the financial issue be put on a letter agreement signed by the representatives of each Lodge involved. It should cover which Lodge will collect the money, when and by whom it will be counted, how the expenses will be paid (net from proceeds, paid individually in advance, donated, etc.) and how and when it will be divided between the participating Lodges and how and when it will be presented to the recipient. A copy of this letter should be given to each Lodge so that it can be sent along with their request for Matching Funds to the Foundation. We must have a clear picture of the total amount raised during the fundraising event, how the funds were divided among each Lodge involved in the fundraiser, how much each Lodge will be seeking in Matching Funds and the total each Lodge will be giving to the recipient.

No applications will be submitted to the Matching Funds Committee until ALL applications have been received from each of the partnering Lodges. This allows the Committee to see the total picture at one time.

## WHAT IS A PARTNERSHIP?

Just as the name implies, it means that both partners have actually been involved. Both the Lodge and the other organization(s) need to have actually done something.

For example - **THIS IS NOT A PARTNERSHIP:** The Lions Club is creating a park in town for the city children. They go out, raise the money, and plan the park. A couple of the Lions are also Masons. They get the Lions Club to give some of the money the Lions raised to the Lodge, so that the Lodge can use it to apply for Matching Funds to give to the park.

*That's simply a pass-through or laundering of money. The Lodge, as a Lodge, didn't do anything except vote to apply for funds.*

**BUT THIS IS A PARTNERSHIP:** The Lions Club decides to create a park. A couple of the Lions are also Masons, and they think the Lodge should be involved. After getting permission from the Lions to talk to the Masons, they bring it up in Lodge.

The Lodge votes to work with the Lions on the project. The two clubs hold a planning meeting. It is agreed that they will do a joint fund raiser.

The Lions Club has pancake dinners all the time; they have the equipment and the know-how.

It is agreed that both groups will sell tickets (the tickets say "Lions and Masons Pancake Supper, proceeds to benefit new park"). The Lodge agrees to rent the space for the dinner.

The Lions Club will do the cooking. The Lodge members will help set up the tables, clean up afterward, serve in the serving line, and greet people at the door. The two groups will split the costs of supplies, printing, etc., for the event.

***Both groups are fully involved. That's what makes the difference. That's why the Partnership application asks you to indicate what percentage each group did. Obviously, we can't put suggestions for all possible fund raisers on the form, some are dinners, some are auctions, some are car-washes, etc. Estimate percentages on as many of the lines as apply, and then use the blank lines to tell us what each group did.***

It helps with the application process if you include tickets showing both groups as participating, or copies of flyers distributed in the community, or copies of newspaper stories in which both the Masonic Lodge and the partner are mentioned as sponsoring the event. Anything you have which shows the involvement of both groups will help the processing go faster.

## Does the involvement of the Lodge have to be 50/50?

There's no practical way to tell what 50/50 is. For a dinner, how do you balance cooking against serving and cleaning? For a garage sale, how can you tell how much junk each group brought to be sold?

**We ask the Lodge to be involved in the partnership.**

If, when you look at it written out on the application, it seems that the Lodge effort is a little light, but you know that there were circumstances which made that bigger than it looks, tell us about it on the application. We're happy to work with you to get all the information.

**Most partnership questions are clear cut, but a few are uncertain. See the *SHADES OF GREY* section of these materials.**

## Quick Test for all Lodges on Matching Funds:

1. Is the recipient **charitable or educational**?
2. Was the Lodge actively involved in raising the funds?
3. If the Lodge is holding a fundraiser, could a member of the community, on arriving at the fundraising event, recognize the Masonic Lodge's involvement in the event? (Remember, in your ads, use the word **Masonic** or **Masons** when referring to the Lodge so that the community is aware that the Masons are involved.)

# SHADES of GREY

Life would be **easier** for all of us if every situation were clear cut and clean - and almost no situation is. Many applications for Matching Funds fall into a grey area of one sort or another.

The best we can do is to admit that those areas exist, try to explain where they are, and then point out that they turn, ultimately, into judgment calls. The more information you can give us, the better judgment we can make.

Grey areas frequently arise because of the nature of an event.

Some examples:

We do not match funds for contributions to the Chamber of Commerce--that's a commercial venture to improve the business in a town. **But, suppose the Chamber of Commerce is sponsoring a drug awareness program in the schools and the Lodge wanted to contribute to that program.** That would probably qualify to match, because the purpose is not commerce, the purpose is drug education.

We don't support youth church camps or mission trips. **But if a camp is for handicapped or disabled children, regardless of religious affiliation, in which no effort is made to convert them to a denomination and it just happens that a church runs the camp as part of its community outreach program, sending a child to such a camp would probably qualify.**

We don't match funds for projects which are the responsibility of some unit of government. So we won't help buy a fire truck for Oklahoma City, because it's big enough to raise the taxes and buy one for itself. **But suppose a town of a couple of thousand people needs a fire truck for its volunteer fire department.** The tax base simply isn't there for the town to buy one, and we'd probably match funds to help.

There are many projects which we would consider matching in small towns which we wouldn't match in larger communities. Traffic control signs, street lights, and ambulance equipment are some examples.

We select on the basis of size of community because, in small communities, the service simply can't be provided unless individuals raise the funds and do it themselves. That may not always be fair, but neither does it seem fair to deny a fire truck to a town of 1,200 people just because a town of 1,000,000 can afford to buy one for themselves.

In trying to make sense of the grey areas, remember that we must ask these questions:

**Does it fit as a charitable or educational need?**

**Does it have a benefit other than entertainment or celebration?**

**Does it meet a safety or social need for the community?**

**Is it the sort of project with which we want the Masonic fraternity associated?**

It's not that we "take off our Masonic hats" when we make these decisions. We know that a Mason is always a Mason, but sometimes we have to add other considerations to the mix, such as the requirements of the law.

## **Celebration vs. Service**

We don't match funds for a community celebration. Celebrations are good and important to the life of a community, and we all encourage Lodges to be a part of them. But the use of tax-exempt charity funds through the Foundation is a problem. There needs to be some value past entertainment.

**But suppose as a part of the community celebration, the Lodge wanted to have a booth (or support a booth by some other organization) where children could experiment with painting or making pots, or some other art or craft. Or suppose that as part of the Centennial celebration of a town, a book on the history of the community is being prepared and the Lodge wanted to help sponsor that book. Or that as part of the celebration a park is being developed which will commemorate the history of the area and provide a place for recreation. Or that a community holds a festival each year which brings in exhibits of history or of American Indian culture or some other such educational event. Participation in those events might be eligible for Matching Funds.**

Best way to be sure is to call the Foundation and check it out.

## Strings Attached

A grey area can be caused by the source of funds. Any person or individual has the right to give a Lodge money and say "Use this for some good purpose." No problem. The problem arises when people start attaching strings.

Not all strings are a problem. Someone gives the Lodge money and says "Use this for a scholarship." Again, the funds could be matched and used for a scholarship with no difficulty. **BUT** if that same person gives the Lodge money and says, "Get this matched and give a scholarship to my niece, Susie Que," that isn't eligible for Matching. The Lodge is simply serving as a source through which he can give extra money to his niece. The grey area is in between. If he says, "Give the scholarship to someone who wants to go to OSU to study accounting," that's no real problem, because the courts have ruled that is legal. But if he says, "Give the scholarship to someone who wants to go to OSU to study accounting, who is a girl, aged 18 years, 9 months, seven days, whose initials are S.Q. and who has a grade point of 3.87," the answer is "no."

A group of parents of Little League players come to the Lodge and say, "Here's \$100, go do with it what you want." No problem. But that same group comes to the Lodge and says, "Here's \$100, have it matched and give us \$200--you'll get the credit and won't have to do anything"---again, no. That's not giving money to the Lodge, that's attaching strings and telling the Lodge how the money is to be spent. That's laundering.

Again, the best advice we can give you in the Grey Areas is this:

**CALL THE FOUNDATION  
AND LETS TALK ABOUT THE PROJECT IN  
ADVANCE.  
SOMETIMES A LITTLE EXTRA INFORMATION  
CAN CLEAR UP A LOT OF GREY.**

**(405) 348-7500  
Toll Free: 1-877-5-MASONS  
(1-877-5 6 2 7 6 6 7)**

# COMPLETING THE PROCESS

The final step in the Matching Funds process is the **COMPLETION FORM**.

We know it's probably the hardest part of the process to get done. The shouting's all over, the project is completed, the check has been presented, everybody's relaxed and ready to sit back for a bit or to go on to the next project. . .

. . . and here's this one last form to be messed with. Maybe next week---

But the Completion Form is an important part of the process for these reasons:

- \* **It provides documentation we can provide to the I.R.S.**
- \* **It lets us clear our books of the contribution.**
- \* **The information you provide is helpful in preparing the Foundation's Annual Report and in getting publicity for your Lodge**
- \* **It helps in our budget planning for the next year.**

So please, as quickly as you can after the event, fill out the form and send it to us.

We especially appreciate those who send along photographs and newspaper clippings. **You've seen some in this Kit--the photographs can tell a powerful story.**

**Thanks for your help.  
And thanks for the work you are doing for Masonry.**

***SAMPLE  
OF A  
“CORRECTLY  
COMPLETED  
APPLICATION”***

# MASONIC CHARITY FOUNDATION OF OKLAHOMA

P.O. BOX 2406 \* EDMOND, OKLAHOMA 73083 \* (405) 348-7500  
TOLL FREE 1-877-5-MASONS

## APPLICATION FOR MATCHING FUNDS

In order to qualify for Matching Funds, the LODGE must be actively engaged in raising the money to be matched.

The Lodge then votes to contribute the funds from the Lodge operating account. **THE PRESENTATION MUST NOT BE MADE UNTIL MATCHING FUNDS ARE RECEIVED**, at which time the total gift should be made in the name of the local Lodge only (except in the case of a Partnership). This is in order to receive maximum publicity for your Lodge.

Today's Date: February 1, 2010

### LODGE INFORMATION

Lodge Name & Number: Lively Masonic Lodge #600

Lodge Mailing Address:

555 South Main Street

(street address or P.O. Box)

Lively, OK 73000

(City, State & Zip)

### RECIPIENT INFORMATION

In order to qualify for Matching Funds the recipient must be charitable or educational.

Name(s) of Recipient: Brother John David Doe

If recipient is an individual, is he/she 55 years of age or older?  yes  no

Because *Promises Matter* in Masonry, we owe a special duty to aid and assist our Masonic family.

Is recipient:  Master Mason  Mason's Wife  Mason's Widow  Mason's Mother

Eastern Star (female)

Masonic Orphan (minor)

Explanation of Need (why is it charitable or educational): Brother Doe needs a wheelchair ramp built at his house & repairs made to his house in order to make it wheelchair accessible.

Date of Presentation: When funds are received  
(Give specific date or "when funds are received")

Please allow approximately **10-14 days** from receipt of Application for presentation date. This is necessary for committee action and U.S. Postal Service time.

**SOURCE OF FUNDS**

\$ 1,789.30 Amount Lodge is contributing (from Treasury, Pass-the-Hat and/or Fundraiser)

\$ 1,789.30 Amount the Lodge is requesting to be matched

\$ 3,578.60 Total amount to be given to recipient(s)

1/12/10 Date Lodge voted at a stated meeting to seek Matching Funds to help the recipient.

Is emergency action required? Yes  No

The Masonic Charity Foundation can only match funds raised by the Lodge. This can be done in any of 3 ways, or by a combination of approaches:

1. The Lodge can vote the funds out of the Lodge treasury.
2. The brethren of the Lodge can "pass the hat".
3. The Lodge can go out into the community to raise the money.

Please show below the source(s) of the funds the Lodge is contributing to be matched.

Lodge Treasury \$ \_\_\_\_\_

Pass the Hat \$ \_\_\_\_\_

Lodge fund-raiser \$ 1,374.00 Describe fund-raiser (ie: breakfast, dinner, auction, bake sale, etc.)

hamburger & hot dog dinner held at the community center

(Enclose any newspaper articles, flyers, fund-raising tickets, etc. that show the Lodge involvement in the fund-raiser. The more information received from the Lodge the better able is the committee to make a decision.)

\$ 415.30 Special donations & other special sources during the fund-raiser

Describe Source: Pie & cake auction held during the event raised \$226

Donation jar raised \$189.30

**SIGNATURES**

(Sec. Signature) Stan Mason

(W.M. Signature) Bob Goodguy

(Daytime Contact #) (405) 555-1212

(Daytime Contact #) (405) 555-2121

SEAL



## MATCHING FUNDS PROCEDURE

1. Pick a cause.
2. Unless the philanthropy is confidential, make public announcements of the fund and activity.

**Note: Since your Lodge will not know for sure whether the project will qualify for Matching Funds until the end of the application process . . . DO NOT ADVERTISE in advance that funds will be matched.**

3. Raise the funds
  - A. Vote the funds from the treasury.
  - B. Take a collection among the Brethren.
  - C. Hold a community fund-raiser.
  - D. Any combination of the above.
4. Segregate the funds and hold them.
5. Submit an application for Matching Funds.
6. When received, deposit check from the Masonic Charity Foundation in your Lodge's account.
7. Write a check for the entire amount (Matching Funds + Lodge funds) and present it to the recipient.
8. Complete and return the "Completion Form" after the presentation is made.

\*\*\*\*\*

In case of emergency, call the Masonic Charity Foundation . . . 405/348-7500 or toll free 1-877-5-MASONS.

If you have questions about whether certain funds qualify for matching, call the Masonic Charity Foundation. We're always happy to talk with you and to offer any support we can to your efforts to make Masonry real in the world.

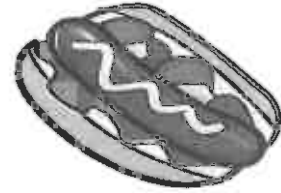
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## MATCHING FUNDS RULES & CONDITIONS

- A. In order to qualify for Matching Funds the recipient must be charitable or educational.
- B. The Masonic Charity Foundation will match local Lodge contributions dollar for dollar in either of these eligible areas, not to exceed \$12,500 to any one Lodge in one calendar year. A Lodge may use all of its \$12,500 pool to match Lodge funds raised by the Lodge for **Promises Matter Matching Funds** to assist Oklahoma Masons, their wives, widows, mothers or female OES members. If unused for Promises Matter, a Lodge may draw up to \$10,000 annually to match funds raised by the Lodge to assist local charitable or educational projects (**Community Matching Funds**).
- C. Local causes are to be determined by the local Lodge. The Lodge is expected to use normal care in evaluating the local personalities and conditions to avoid improper gifts.
- D. Local charitable causes may be sponsored by a private entity, organization or government. If sponsored by a government they must be for public safety or life safety areas and must not be presently fundable by a government budget. Parks and community youth organizations are permitted. Funds for planning, research, sectarian organizations, community celebrations and festivals are not permitted.
- E. Contributions from local Lodge building funds **will not** be matched.
- F. The Lodge must already have the FUNDS on hand and set aside from the Lodge operating fund before being eligible for matching funds. The presentation must be made in the name of the Lodge only.
- G. All money (local funds and matching funds) are to be presented at one time by and in the name of the local Lodge. This is to afford the local Lodge maximum credit and publicity.
- H. A Lodge must make application and **receive the funds** from the Masonic Charity Foundation **BEFORE** presenting any funds to the charities.
- I. Lodges must certify to the Masonic Charity Foundation that the funds from the Foundation were actually used for the approved purpose by returning the Completion Form enclosed with the Masonic Charity Foundation check. The return address is shown on the Completion Form.

Applications for Matching Funds are available at:

Masonic Charity Foundation  
PO Box 2406 \* Edmond, OK 73083-2406  
Telephone: 405/348-7500  
Toll Free: 1-877-5-MASONS  
(1-877-562-7667)



**HAMBURGER & HOT DOG DINNER  
To Benefit  
John David Doe**

**Sponsored by Lively Masonic Lodge & Seniors Helping Seniors**

**John David Doe, a longtime member of the community, has always assisted others with their needs. Now, he needs our help to make his home wheelchair accessible!**

**Come join Lively Masonic Lodge & Seniors Helping Seniors with this very worthy project. Dinner & cake/pie auction to be held as follows:**

**When: Saturday, January 30, 2010**

**Time: 5:00 p.m. – 8:00 p.m.**

**Where: Lively Community Center, 100 South Main Street  
Lively, Oklahoma**

**Price: \$5.00 for Adults or \$2.00 for Children under 12  
(All donations are welcome!)**

**Tickets can be purchased at the door or in advance by calling Lively Masonic Lodge (555-1212) or Seniors Helping Seniors (555-0101).**



**An assortment of cakes & pies will be auctioned during the event.  
(Anyone wanting to donate a dessert for the auction can drop the dessert  
by Lively Community Center on Friday, January 29th from noon – 5 p.m.)**

**Hamburger & Hot Dog Dinner  
To Benefit John David Doe  
Sponsored by Lively Masonic Lodge & Seniors Helping Seniors**

**January 30, 2010**

**5:00 p.m. – 8:00 p.m.**

**Lively Community Center, 100 South Main Street, Lively, Oklahoma**

**\$5.00 for Adults**

**\$2.00 for Children under 12**

**Donations are welcome!**

**Pie & Cake Auction will be held during the event.**

**Ticket #101**

***SAMPLE  
OF A  
“CORRECTLY  
COMPLETED  
COMPLETION  
FORM”***

# COMPLETION FORM

For

## Matching Funds & Grants

PLEASE COMPLETE IMMEDIATELY AFTER PRESENTATION  
& RETURN TO:

Masonic Charity Foundation, PO Box 2406, Edmond, OK 73083

OR

Email as an attachment to [information@mcfok.org](mailto:information@mcfok.org)

### MATCHING FUNDS

*(Complete this section for any Community or Promises Matching Funds received)*

This is to notify and certify that the Masonic Charity Foundation contribution of \$ 1,789.30  
was matched by Lively Lodge No. 600, presented  
(amount matched)

on: 2/15/10 for: Brother John David Doe  
(Month, day & year) (Name of Recipient)

This amount plus our contribution made the total presentation equal \$ 3,578.60  
(total amount presented)

### GRANTS

*(Complete this section for any Promises Matter Grant funds received)*

This is to certify that \_\_\_\_\_ Lodge/Chapter No. \_\_\_\_\_  
(Lodge or Chapter Name)

received a check in the amount of \$ \_\_\_\_\_ from the Masonic Charity Foundation that was

used entirely to assist \_\_\_\_\_ as was outlined in  
(name of needy member)

the grant approval letter. If different, summarize the expenditures on a separate sheet.

### SIGNATURES

Stam Mason  
Secretary

Bob Goodguy  
Worshipful Master or Worthy Matron

S  
E  
A  
L

Date: February 15, 2010

( If available, send photos for possible use on our website or Annual Report, along with any newspaper coverage, etc.  
Digital photos may be emailed to us at [information@mcfok.org](mailto:information@mcfok.org) )

(revised December 2009)