

MASONIC CHARITY FOUNDATION OF OKLAHOMA

P.O. BOX 2406 * EDMOND, OKLAHOMA 73083 * (405) 348-7500
TOLL FREE 1-877-5-MASONS FAX (405) 348-9031

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: _____

LODGE INFORMATION

Lodge Name & Number: _____

Lodge Mailing Address:

(street address or P.O. Box)

(City, State & Zip)

RECIPIENT INFORMATION

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

Name(s) of Recipient: _____

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): _____

Date of Presentation: _____

(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

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.

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

Lodge Treasury	\$ _____
Pass the Hat	\$ _____
Fundraiser	\$ _____ (Describe fundraiser below)

\$_____ Amount the Lodge is requesting to be matched

\$_____ Total amount to be given to recipient(s)

Describe lodge fund-raiser (ie: breakfast, dinner, auction, bake sale, etc. & where event was held)

(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.)

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

Describe Source: _____

.....
_____ **Date Lodge voted at a stated meeting to seek Matching Funds to help the recipient.**

Is emergency action required? Yes _____ No _____

SIGNATURES

(Sec. Signature) _____ (W.M. Signature) _____

(Daytime Contact #) _____ (Daytime Contact #) _____

SEAL

PARTNERSHIP PROGRAM

**TO BE COMPLETED ONLY IF LODGE PARTNERS
WITH ANOTHER ORGANIZATION**

(the first two pages of this form must be completed also)

In order to qualify for Matching Funds, the Lodge as a Lodge MUST be actively involved in the Partnership with the other organization(s).

A Partnership Program is one in which the Lodge works with other organizations to raise funds and accomplish some goal. The goal must meet the same requirements as if the Lodge were to apply for Matching Funds without a partnership.

List the name(s) of the Partners with whom the Lodge is cooperating:

In order to consider the request, the Charity Foundation needs to know in what ways the Lodge participated in the partnership. Below is a list of activities. Please mark those which apply, showing the percentage of work done by the Lodge and the percentage of work done by the partner(s). Please use the blank lines to indicate activities not listed.

(For example: Lodge Partner)
 35% Sold Tickets 65%
 100% Bought Supplies 0%

<u>LODGE</u>	<u>ACTIVITY</u>	<u>PARTNER(S)</u>
_____ %	Planned event	_____ %
_____ %	Arranged publicity	_____ %
_____ %	Sold tickets	_____ %
_____ %	Bought supplies	_____ %
_____ %	Arranged for donation of supplies/food/etc.	_____ %
_____ %	Prepared/served food	_____ %
_____ %	Cleaned up after event	_____ %
_____ %	Provided/arranged for location	_____ %
_____ %	Gathered items for sale/auction	_____ %
_____ #	Number of Volunteers	_____ #
_____ %	Collected donations	_____ %
_____ %	_____	_____ %
_____ %	_____	_____ %

Please list any special events or publicity in connection with the fund-raising event.

PLEASE NOTE: The request must comply with all the rules and conditions listed on page 4 of this form, with the exception that in Conditions (F) and (G) the presentation of the check will be made in the name of the Lodge and the Partner organizations when appropriate.

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.

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 Fax: 405/348-9031
Toll Free: 1-877-5-MASONS
(1-877-562-7667)

(revised 1/3/11)