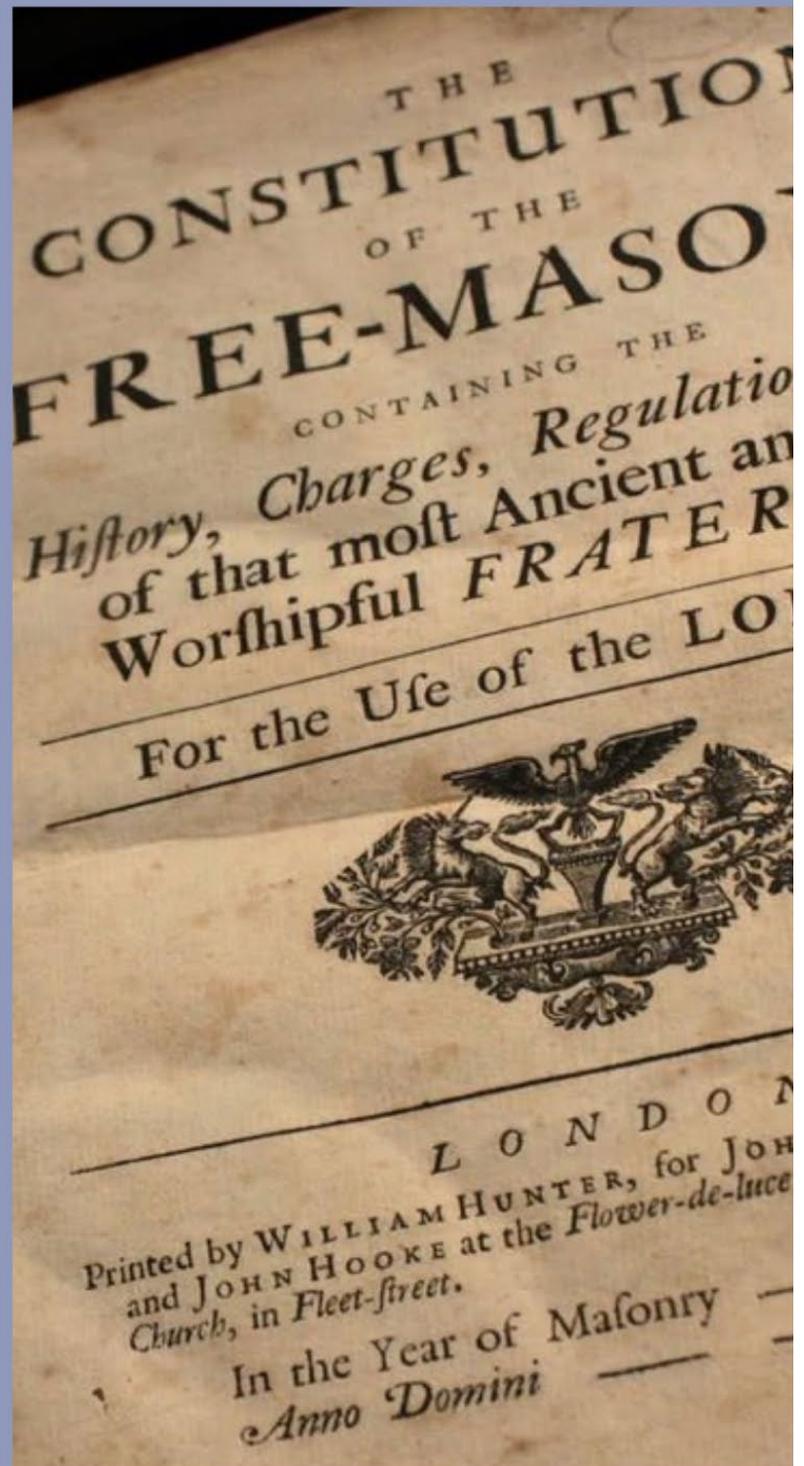




MASONIC CHARITY  
FOUNDATION OF  
OKLAHOMA

# PROGRAM GUIDE



PO BOX 2406, EDMOND, OK 73083

PHONE: (405) 348-7500

FAX: (405) 348-9031

EMAIL: [INFORMATION@MCFOK.ORG](mailto:INFORMATION@MCFOK.ORG)

WEBSITE: [WWW.MCFOK.ORG](http://WWW.MCFOK.ORG)

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**Dear Brother,**

We appreciate the hustle and bustle of everyday life. At the Masonic Charity Foundation, we would like to make your responsibilities a little easier by simplifying the information in relation to our many programs.

This guide pulls together information on the following programs:

- Matching Funds (Community Matching Funds & Promises Matter Matching Funds)
- Promises Matter Grants
- Student of Today/Teacher of Today
- Masonry in Action Award
- Masonic Charity Foundation Photo Contest
- Senior Essay Contest
- High School Ethics Bowl

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

**Contact us: Masonic Charity Foundation of Oklahoma**

Phone: 405-348-7500

Toll Free: 1-877-562-7667

Fax: 405-348-9031

Email: [information@mcfok.org](mailto:information@mcfok.org)

**Mailing Address:** PO Box 2406, Edmond, OK 73083

**Web Page:** <http://www.mcfok.org/>

**Foundation Programs:** <http://www.mcfok.org/programs/>

**Online Forms:** <http://www.mcfok.org/online-forms/>

**Make a Donation:** <http://www.mcfok.org/donation/>



# MATCHING FUNDS

We sometimes forget how important Masonic Charity is or how vital a role you play in it. We should all be proud of what we accomplish, a feat especially true for you, the Lodge secretary, for your commitment to the process and keeps the programs working.

Of all charities designed to help individuals in Oklahoma:

Masonic charity is the **oldest** existing nonprofit in the state of Oklahoma.

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

Masonic charity **meets a wider range of needs** than any other comparable organizations.

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

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 guide, 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



# Matching Funds FAQ

## Why were Matching Funds established?

Long before other charitable organizations existed, Freemasons were dedicated to their communities and that commitment to charity continues on into present day. Many people fall through the cracks in various governmental programs and at times are even overlooked by charitable institutions. The local needs can sometimes be overwhelming for statewide organizations to meet the demand. This is where local Lodges can step up and fill a void. **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 to request Matching Funds

Simply fill out a Matching Funds application and submit your application in one of four ways:

- Visit our website at [www.mcfok.org/online-forms](http://www.mcfok.org/online-forms)
- Mail completed form to PO Box 2406, Edmond, OK 73083 or email to [information@mcfok.org](mailto:information@mcfok.org)
- The form requires signatures by the Secretary & Worshipful Master and must have a Lodge seal
- Fax: 405-348-9031 (**NOTE: If you email or fax your application, DO NOT MAIL THE ORIGINAL.**)

## What happens when request is received?

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

## What does the Matching Fund Committee do?

They vote on all applications. The committee is comprised of board members from MCFOK. An application must receive a majority of "YES" votes in order to be payable.

## Do applications get turned down?

The majority of applications are approved. There are instances where we contact the Lodge and ask for more information. At times, there are instances where the Committee will decide that an application didn't meet the requirements (see **A FEW RULES** section). There is no way to know in advance if an application will get turned down. The section titled **SHADES OF GREY** can further explain the nuances of application. If you are unsure, please call the office and we will be happy to answer your questions.

We hope this information will help make your application process faster and easier and less frustrating. We are all Masons together, working towards the same goals

Let's work together to get your applications through quickly and successfully.

## Quick Test for all Lodges on Matching Funds:

1. Does it qualify by being education or charitable?
2. Does the source of funds qualify for funds? Was the Lodge active in raising the funds?
3. Give as much information as possible.

Let's take a look at some common one-word responses we receive and why there wouldn't be enough information to process your request, delaying payment to your Lodge:

Band Uniforms: Did the Lodge pay to have them cleaned? Did you help buy new ones?

Shelter: A bus shelter? A shelter for battered women? A shelter for the homeless?

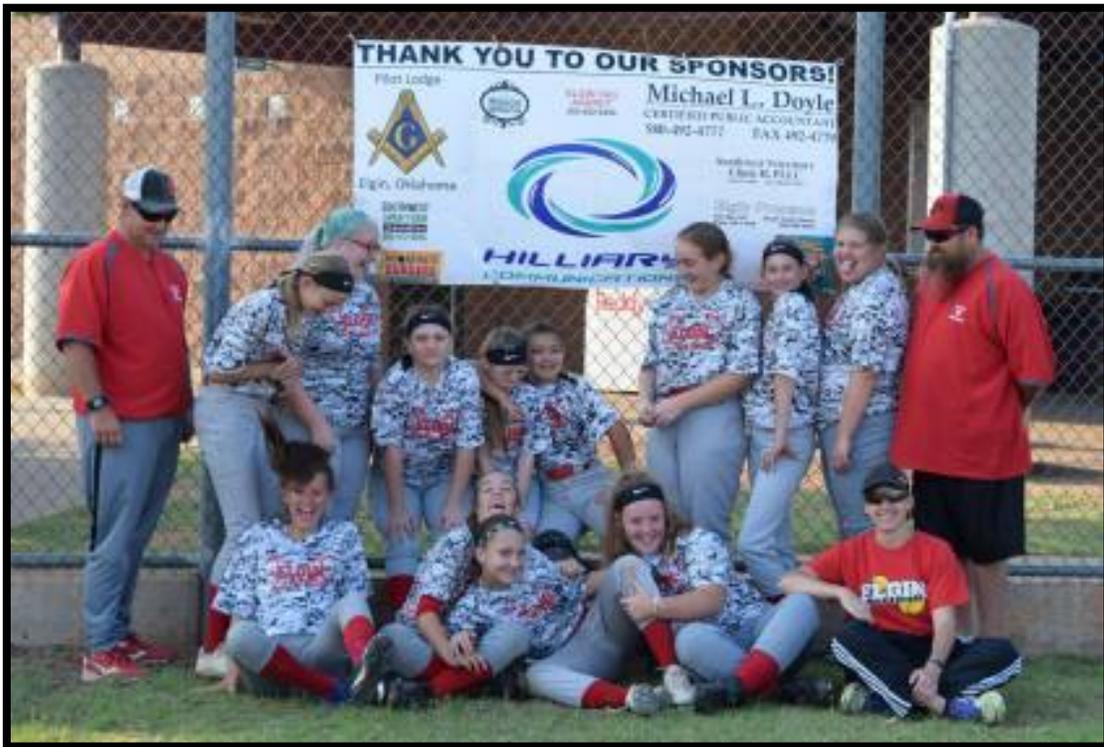
1. **Give us information about the source of funds.**
2. If the project was a **partnership** with another organization, the partnership section of the application must be completed.
3. **Before submitting your application, be sure your application is completely filled out. This includes attaching copies of fundraising flyers, tickets, newspaper articles, etc.** These attachments are necessary, even if your Lodge did this exact fundraising event in a previous year.
4. Once you have received a Matching Funds check and funds have been presented, please fill out and send in the **Completion Form** as quickly as possible.

**The Completion Form is a critical part of our audit documentation. These documents are essential for the IRS auditors and to prove that the funds of the Foundation are conforming to tax codes. If the form is not returned in a timely manner, your Lodge's Matching Funds account will be frozen until the delinquent form is received.**



## FUNDRAISING IDEAS

1. **Wait until your Matching Funds have been approved** before advertising your fundraiser. It's good practice to have everything in order before making it public.
2. **In your advertisement**, remember to use the word **Masonic** or **Masons** when referring to the Lodge so that the community is aware that the Masons are involved.
3. **Examples of fundraisers for Matching Funds** as they must support education or charity:
  - A. Scholarships for local students
  - B. Someone has lost their roof in a storm
  - C. The local baseball team is in need of uniforms
  - D. Purchasing goods for the local food pantry
4. **Examples of non-eligible fundraisers for Matching Funds:**
  - A. Fourth of July Celebrations
  - B. Gravestones
  - C. Maintenance or upkeep of Lodges
  - D. Religious or sectarian event



# **MATCHING FUNDS - A FEW RULES**

## **Rules for Funds**

As a 501(c)3 our organization and Lodges are beholden to the IRS and the rules in place to protect nonprofit organizations. With our tax-exempt status, we could not continue our good works. Donations made to the organization are tax deductible. In addition, we do not pay income tax on money earned by the Endowment Fund. Some of the following rules are set by the Fraternity and Foundation to ensure that Lodges have an equal opportunity to get Matching Funds. It is imperative that projects reflect well on the Fraternity.

### **Is there a minimum amount?**

Yes, the MINIMUM amount per recipient the Foundation will consider is a request for \$100, making a total gift of \$200 including Matching Funds per recipient.

### **How can the money to match be raised?**

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

1. The Lodge can vote the money out of its treasury.
2. The Lodge members can "pass the hat."
3. The Lodge can hold a fundraiser.

If the Lodge solely holds a fundraiser, some examples of acceptable methods are a garage sale or a pancake dinner. Also, if the Lodge puts out mason jars on the counters of local stores, with a sign which says Masonic Lodge #000 is raising funds to support Little League is an established method. In the section titled **PARTNERSHIPS** you can learn more about partnering with other organizations for a project.

### **Some sources of money do not qualify**

1. Funds you receive from another Masonic organization or foundation do not qualify for matching. You may accept funds for your own charitable use, but they cannot be matched.
2. You cannot match funds raised that 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. Due to a change in state law, money raised via raffle is acceptable.
3. Money can't be laundered through the Lodge in order for a person or an organization to double their money. (See the **Strings Attached** section)

Electronic online sales using a third-party vendor, such as GoFundMe, PayPal, E are not eligible for Matching Funds.

## MATCHING FUNDS - A FEW RULES - continued

### Are there projects which won't qualify?

Below is an extended list of disqualifications.

- 1. Celebrations** 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 but not Matching Funds
- 2. Contributions for sectarian purposes.** 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.
- 3. Contributions to the Chamber of Commerce** since its purpose is commercial, not charitable.
- 4. Contributions to commercial enterprises.** Giving money to a local store to help get it "over the hump" will not qualify for funds.
- 5. Contributions to support or create monuments or war memorials** are not eligible for Matching Funds.
- 6. Contributions for flags at cemeteries to honor deceased veterans, grave markers or flowers for cemeteries** are not eligible.
- 7. Projects to benefit the Lodge.** It's a matter of law. Lodges must manage their own improvements.
- 8. Money used to purchase ads** 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.
- 9. Contributions to other Masonic organizations, foundations, etc.** The only exception is contributions made by your Lodge to the Youth Orders.
- 10. Meals are not eligible for Matching Funds.** This policy has been in place from the beginning of the Matching Funds program because the Fraternity is so centered around Lodge fraternal dinners. This ruling on not funding meals includes, but is not limited to, teacher/student appreciation meals, awards banquets, booster club meals for students, etc. This is not to be confused with nutrition programs such as Meals on Wheels, Nutrition Program at Senior Citizens Centers & Public Schools, Food for Kids Backpack Program, etc. The "nutrition" programs are considered charitable and are eligible for Matching Funds. Please note that it is still permissible for the Lodge to use the sale of food as a fundraising tool.
- 11. Capital improvements.** Improvements to properties not owned by a 501 (c) (3) organization.
- 12. Letter jackets, championship rings & trophies.** These are not charitable or educational.
- 13. Promotional Cards:** These are cards which are sold by sports teams, booster clubs, etc. that can be purchased for a small fee in exchange for savings at various establishments within the community are not fundraisers.
- 14. Private Music Lessons.**
- 15. Retroactive requests:** A Lodge must make application and receive the funds from the Foundation BEFORE presenting any funds to the charities. Therefore, any "retroactive" requests will be denied.

Lodges absolutely may participate in the above projects; these are just the ones excluded from Matching Funds due to not meeting the requirements.

## **Matching Funds – A FEW RULES – continued**

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

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

**Promises Matter Matching Funds** help 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. Remember to complete the box on page 1 if the application is for any of these listed people.

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

- 1. Programs which are sanctioned by the schools** Contributions for band uniforms, athletic equipment, etc. are generally OK.
- 2. Aids in education** such as Adopt a Teacher, Literacy programs, scholarships, library books, etc. qualify.
- 3. Programs which help someone in need** such as assisting with utility bills, medical expenses, special equipment such as wheelchairs, as would food kitchens, shelters, etc.
- 4. Community cultural or educational events or programs.**
- 5. Programs that benefit the youth** such as support for Little League, etc.
- 6. Programs which benefit the elderly**, such as senior citizen centers, meals on wheels, transportation.
- 7. Programs which are of public benefit**, such as equipment for volunteer fire departments.
- 8. The following organizations or items are also eligible for Matching Funds:** Masonic Service Association, Vizavance (formerly, Prevent Blindness Oklahoma) and the Payne Education Center.
- 9. Child Identification Program (C.H.I.P.)** – the program uses cutting-edge technology to provide a means of identifying their child in the case of abduction or other emergency in which positive ID is essential. (A CHIP invoice must accompany the Lodge's Matching Funds request.)

**There are many other possibilities. Please call the office  
if you have any questions (405) 348-7500**

## MATCHING FUNDS - 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 an emergency need, makes the Lodge a player in the community and gets exposure for the Fraternity.

When forming partnerships with other organizations the Lodge must do more than vote to apply for Matching Funds or have just a few members turn up for an event. The Lodge members must be involved in the event and the public must be aware that the Masons are involved (this is done through community advertising, such as newspapers or Facebook, etc.).

There are some special considerations in a partnership arrangement.

**1. The purpose must meet the general rules of the Matching Fund program.** No funds for a partnership for a project to which the Lodge could not apply for funds by itself.

**2. Both partner and Lodge must be fully involved.** Both organizations must contribute to the good work.

**3. 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:**

- Two or more Lodges to actively work together on a single project to raise money for a charitable or educational endeavor.
- Each Lodge must actively participate in the planning sessions for the fundraiser. Make certain that each Lodge feels the project is meets requirements. 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.
- 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.

## 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.

### THIS IS NOT A PARTNERSHIP:

The Lions Club is creating a park in town for children. They 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, in turn the Lodge uses it to apply for Matching Funds.

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

### 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 to talk to the Masons, they bring it up in Lodge. The Lodge votes to work with the Lions. The two clubs hold a planning meeting and agree they will do a fundraiser.

The Lions Club frequently has pancake dinners and have plenty of equipment. 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 and other needs for the event.

Both groups are fully involved. This is the imperative set out in the Partnership application for you to indicate what percentage each group contributed. 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, copies of flyers distributed in the community, anything you have which shows the involvement of both groups. Involvement does not have to be 50/50 nor is there a good way to determine it. We just ask that the Lodge makes sure to put in every possible effort for partnerships. Tell us all the details  
**Most partnership questions are clear cut but if there are concerns see the SHADES OF GREY**



## SHADES OF GREY

The process would go smoothly if all situations were black and white; unfortunately, they aren't. These leads us to the discussion in this section of how many applications for Matching Funds fall into a grey area.

Grey areas frequently arise because of the nature of an event. The more information you can give us the better a judgement can be made.

### **Examples:**

- We do not match funds for contributions to the Chamber of Commerce as they are a commercial venture to improve the business in a town. However, 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 but education.
- We do not support youth church camps or mission trips. However, if a church ran a camp for children, regardless of religious affiliation, in which no effort is made to convert them to a denomination, is part of its community outreach program, sending a child to such a camp would probably qualify.
- We do not match funds for projects which are the responsibility any branch of government. We will not help buy a fire truck for Oklahoma City, because it's has its own budget. However, if a town of a 3,000 people need a fire truck for its volunteer fire department, the tax base 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 such streetlights and ambulance equipment.

These decisions are based on need and means of the communities they are going to.

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

- a. Does it fit as a charitable or educational need?**
- b. Does it have a benefit other than entertainment or celebration?**
- c. Does it meet a safety or social need for the community?**
- d. Is it the sort of project with which we want the Masonic fraternity associated?**

## **Celebration vs. Service**

We don't match funds for a community celebration. We appreciate occasions to bring the Lodge and community together but the use of tax-exempt charity funds through the Foundation for these events is problematic as there needs to be more value than entertainment.

### **What are possible exceptions to this:**

YES: A community holds a festival each year which brings in exhibits of history or of Native American culture or another educational event. Participation in those events might be eligible for Matching Funds.

NO: The town is having its annual 4<sup>th</sup> of July celebration and the Lodge wanted to fund fireworks for the display. That would be a great celebration but not educational or

If you're unsure, please call the Foundation.

### **MATCHING FUNDS - STRINGS ATTACHED**

A grey area can be caused by the source of funds. Any person or individual has the right to give money to a Lodge and ask for it to be used for a good purpose. It is when stipulations are attached to that money problems arise. Not all string are a problem. A donor gives money to the Lodge and asks that it be used for a scholarship. The funds could be matched and used for a scholarship with no difficulty. **HOWEVER**, if that same person gives the Lodge money and asks that it be matched and used as a scholarship for their niece that isn't eligible for Matching. 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. If he says, "Give the scholarship to someone who wants to go to OSU to study accounting, who is a girl, aged 18 years," the answer is no.

### **Examples:**

YES: 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: A 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." That's laundering.

Matching Funds are an important role the Lodge plays in the community and we want to ensure the best possible outcome.

**Call the Foundation if you have any questions or concerns about your project:**

**(405) 348-7500**

# MATCHING FUNDS - COMPLETING THE PROCESS

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

Now that your project is over there is one final **IMPORTANT** form to complete. As quickly as you can, please complete and submit the form. This is necessary for several reasons:

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

We love to profile our local Lodges practicing their commitment to the local community. It would be a wonderful addition to send any photographs, newspaper clippings, or social media about the event. The Foundation is committed to the powerful stories shared by our Lodges.

**Thank you for your dedication and the work you do for Masonry.**



## How to fill out Matching Funds form online



THE MASONIC CHARITY  
FOUNDATION OF OKLAHOMA

### Matching Fund Application

Lodge \*



Drop down box and  
find your Lodge

Title \*

- Secretary  
 Worshipful Master

Name \*

First Last



Enter your name

Email \*

Daytime Phone Number \*

 -  - 

### ### ####



Phone number  
where you can be  
reached

Date lodge voted to request Matching Funds \*

 /  / 

MM DD YYYY

**Name or Recipient or Organization \***



Person/Organization receiving funds

**Is the recipient any of the following \***

- Master Mason
- Mason's Wife
- Mason's Widow
- Mason's Mother
- Eastern Star
- Masonic Orphan \*minor
- None of the above – this is a community application



Choose which option applies

**Explanation of Need \***

Give brief description of need

**Is recipient over the age of 55? \***

- Yes
- No
- Does not apply, application is for an organization

**Source of funds raised by the lodge. Select all that apply \***

- Treasury
- Pass the Hat
- Fundraiser



You can choose 1 or all 3 options

Did the lodge receive any special donations? \*

Yes

No

Describe special donation or special circumstances here

Here you would explain if you have been given any special donations etc.

Special donation amount. If no monetary donation, put 0.00 \*

\$  .   
Dollars Cents

If none, put zero

Total amount contributing \*

\$  .   
Dollars Cents

Total amount Lodge is contributing

Total amount the lodge is requesting to be matched \*

\$  .   
Dollars Cents

How much does the Lodge want matched?

Total amount the lodge is going to present the recipient once matching funds are received \*

\$  .   
Dollars Cents

Lodge contribution + amount Lodge wants matched

Upload any fliers, newspaper articles, pictures here

No file chosen

Upload any fliers, newspaper articles, pictures here

No file chosen

Digital pics, fliers,  
newspaper articles

Does the lodge have any comments or inspiring testimonies  
from your charitable act that you would like to share with us?

Does the Lodge want  
to share any neat  
stories with us?  
These stories could  
end up on social  
media possibly

The above information is true and accurate based on my  
knowledge of the information. I understand that pictures,  
flyers, and other news articles become property of the  
Masonic Charity Foundation and won't be returned. \*

Full name goes here

# PROMISES MATTER

The “Promises Matter” program has multiple parts:

1. **Promises Matter MATCHING FUNDS:** use Matching Funds application, page 15
2. **Promises Matter GRANTS:** use Promises Matter Grant application, page 21
3. **EMERGENCY Grants for disaster:** \$1,000 grant, no application required; contact our office.

## **Who is eligible for Promises Matter?**

- Master Masons and their wives and minor children
- Widows of Master Masons
- Female members of Order of the Eastern Star

## **Who is NOT eligible for Promises Matter?**

- Former widows of Master Masons who are now re-married to a non-Mason
- Children of Masons who are over 18 or otherwise independent
- Grandchildren, unless they are a legal dependent of a Master Mason/Widow/OES female
- Male members of Order of the Eastern Star, unless they are Master Masons
- Members of Masonic Youth Orders

## **What can Promises Matter be used for?**

These programs may be used for any **charitable** benefit. These include medical bills, groceries, utilities, funeral expenses, and necessary home repairs.

Emergencies due to natural disaster: If a member is displaced from their home due to fire, flood, storm, etc. emergency grants of \$1,000 are available for immediate expenses. These grants require the Lodge Master or Secretary to verify the extent of damage and call our office for assistance. This grant is intended for emergency assistance.

## **Should I use Promises Matter Matching Funds or a Promises Matter Grant?**

Both should be used:

1. A Lodge should seek to care for the individual directly via treasury funds, a pass the hat, or fundraiser. Apply for Promises Matter Matching Funds. Up to the full \$12,500 of a Lodge’s annual Matching Funds budget may be used for Promises Matter.
2. If the need is larger than what the Lodge/chapter can raise on its own, apply for a Promises Matter Grant for the remaining need.
3. The application for Matching Funds and Promises Matter Grant may be submitted simultaneously.

## General guidelines for Promises Matter GRANT requests:

The Promises Matter Grant is a one-time grant which solves the applicant's problem or provides a long-term solution. It is not intended to be a monthly subsidy or replace fiscal responsibility. Like other Foundation programs, the Promises Matter program works directly through the Lodge NOT through the applicant.

### Responsibilities of the Lodge/chapter:

- Vote on the application at a regularly stated business meeting
- Perform proper due diligence to document that the need is valid and charitable
- Attach a letter or memo describing the need and actions taken
- Work with the applicant to completely fill in the requested information
- Make an effort to contribute to the need *before* applying for grant funds

### Responsibilities of the applicant:

- Provide complete and accurate information, including subsequent requests
- Sign the financial information
- Sign the Authorization to Negotiate. This gives permission for a representative of the Lodge or MCFOK to make payments on their behalf or in some cases negotiate lower payment amounts.

### Possible requests:

- A sister is on social security and it only provides for her most basic expenses. She needs dentures but has cannot afford them. *Request:* obtain two estimates of cost; request reasonable payment of care.
- A brother was injured on the job and will be unable to work for three months. His wife works, but her income is insufficient to cover all of their monthly expenses. *Request:* review monthly budget; request amount required monthly for essential items. Clearly indicate the required duration of three months.

### Requests likely to be denied:

- A brother has become disabled and is no longer able to work. He has applied for disability, but has been told it will take two years to complete the filing. He previously made a nice living and has significant equity, but he does not wish to give up his home or lifestyle. He is requesting assistance with monthly household expenses until his disability subsidy is approved. *Denial reason:* The Promises Matter Program is not intended to be a long-term solution or a lifestyle subsidy. *Charitable* need only exists after other available resources have been utilized.
- A sister is no longer able to care for herself and must move into a nursing home. She has requested a grant to cover nursing home expenses. *Denial reason:* government programs are available to provide this need. Grant funds are intended to fill needs which cannot be met by government assistance programs.
-

## Grey Area

After completing years of cancer treatment, a brother is in remission but finds himself unable to meet his financial obligations due to medical bills. His insurance has paid their portion, and the brother has negotiated lower amounts or made payment arrangements where possible, but it isn't enough. *Request:* Medical bills become so large that a Promises Matter Grant is not a practical solution. In these cases, it is wise to look at the applicant's overall debt/equities. Is there a smaller debt that could be paid with grant funds to allow the applicant sufficient room in their budget to make monthly medical payments? Or, are the debts so large that bankruptcy is a more reasonable solution? Grant funds can provide smaller debt relief or may pay the legal expenses for a bankruptcy filing.

### Common errors and delays on grant applications:

- **Incomplete financial information.** ALL application fields should be completed or marked N/A.
- **Inconsistent financial information.** If the application lists a mortgage or vehicle payment, it should also list the approximate outstanding balance of the mortgage/vehicle loan. Similarly, if credit payments are listed, the remaining balance of those credit accounts should be listed.
- **Inaccurate household income.** Income for ALL persons living in the household should be listed including social security, retirement income, disability, child support, workers compensation, and salaries. The program does not have formal income eligibility guidelines; the review committee seeks to understand the household's complete financial situation.
- **No attached memo from the Lodge/chapter.** The Lodge/chapter is expected to provide the reviewing committee with a full picture of the applicant's situation. How did the need arise? Is it expected to recur? Will this fill the need, or will the applicant need help again in a few months? As a general guideline, consider what background information you would want to know if you did not know the applicant and were making a decision on this application.
- **The amount requested has been left blank.** Sometimes a Lodge doesn't know what they should ask for, but the program is not a blank check and the Lodge has to ask for something. If you aren't sure what to ask for, call our office. We can often offer suggestions over which the Lodge can discuss for vote. When appropriate, provide cost estimates from multiple sources.
- **Failure to take other appropriate actions first.** Grants must serve a *charitable* purpose. If an applicant needs assistance paying medical bills, but the applicant shows significant home equity/recreational vehicles/financial resources, the need is not yet charitable. Grants are intended to offer assisted when other available means and resources have been exhausted.

### PROMISES MATTER GRANT APPLICATION CHECKLIST

- All application fields are complete
- All signatures are in place
- The Lodge has attached a letter explaining the circumstances and attesting to charitable need
- The Lodge has already contributed to the need
- The Lodge is requesting a specific dollar amount
- If appropriate, multiple estimates of cost are included

**Questions?** We are here to help, and we know grant applications can be tricky! Call us at 405-348-7500.

## MASONIC CHARITY FOUNDATION OF OKLAHOMA

P.O. Box 2406 - Edmond, Oklahoma 73083

Telephone: 405-348-7500 Toll Free: 1-877-562-7667 Fax: 405-348-9031

# MASONRY MEANS . . . PROMISES MATTER!

## Financial Assistance Application for a distressed Oklahoma Master Mason, his Wife, Widow, or Mother; or a Masonic Orphan; or a female member of an Oklahoma Eastern Star Chapter.

(Note: A Masonic Orphan is defined as a minor child who has lost his Master Mason father.)

As Masons and Eastern Stars we were taught in our Lodges and Chapters:

- ◆ to aid and assist our poor and distressed
- ◆ charity is the distinguishing characteristic of Masons
- ◆ that we promulgate the principles of Brotherly love and RELIEF, or, as Chapter members, we exemplify Electa's distinction of charity.

These duties are carried out both individually and through our Lodges and Chapters. Our local Bodies are the closest organizations to our members and the most likely to know when a Brother or Sister is in need. Thus, it is important that all Lodges and Chapters continually monitor their membership through personal contact, committees, surveys, etc. This fraternal concern our members never ceases.

Our Brothers and Sisters in distress may have many different needs. A member may need...

- ◆ a screen door repaired or a shelf replaced.
- ◆ assistance in shopping for groceries or prescriptions.
- ◆ transportation to the doctor.
- ◆ Companionship or visitation with quality time to combat loneliness, or just stay in touch.
- ◆ financial assistance.

**This financial assistance application must be discussed and approved at a stated meeting and then forwarded to the Masonic Charity Foundation of Oklahoma. A copy should be retained for your records.**

**The Lodge or Chapter is counted upon, as a normal course of their business, to conduct an adequate investigation of all the facts surrounding this request for assistance. This investigation must include a personal visit with both the member and his/her family.**

**Answers to the questions on this form do not automatically determine the approval or denial of the application. This is information intended only to help the Foundation understand the recipient's needs.**

The Lodge or Chapter, as a part of its fraternal commitment, is expected to provide what volunteer and financial assistance it can. Most needs are not financial. Many needs can be met by the local Lodge or Chapter sharing its time, talent, and its own financial resources with its member.

Occasionally, the need will be large enough for financial assistance from the Masonic Charity Foundation.

- ◆ When the need is financial, the **Promises Matter** program has two avenues to assist:
  - 1 - **Matching Funds** for the Lodge as it responds to the financial request.
  - 2 - **Direct grants** to the Brother or Sister on a temporary basis, if the matching funds are not sufficient.

Occasionally, the need will be for answers about which nursing home in town is the best; or answers to confusing questions about eligibility for community or government social programs.

- ◆ When the need is for information, the **Consultation and Referral** program furnishes hard to find information on local nursing homes and can explain rules and procedures to access community and government social programs.

In either case.....

- o Promises Matter and the Masonic Charity Foundation will help your Lodge or Chapter work to find a possible solution for your member.

Promises Matter Grant Application for Mary A. Gooden

**Recipient - Information**

Name Mary A. Gooden Date of Birth 1/2/1942

Telephone: Preferred:  Work  Cell

Home Number: \_\_\_\_\_ Work \_\_\_\_\_ Cell (405) 555-1234

Mail:

Physical Address: 1234 S. Elm P. O. Box: \_\_\_\_\_ City: Somewhere State: OK Zip: 74000

e-mail mag@gmail.us Fax No. \_\_\_\_\_

Fraternal Relationship: Master Mason  Hometown Lodge No. 560  
 OES (Female)  \_\_\_\_\_ Chapter No. \_\_\_\_\_

Master Mason's Name, Lodge Name and Number: Hewas A. Gooden FOR: Wife  Mother   
 Widow  Minor Child

Does applicant have any relatives that can assist with the request being made in this application?  
 No  Yes  (If yes, give name and telephone number) \_\_\_\_\_

Nearest Relative Not Living with Recipient:	Relationship	Telephone Number
<u>N/A</u>		

May we contact the above person about this application? No  Yes

Does Recipient receive Medicaid? No  Yes  (If yes, give number) \_\_\_\_\_  
 If yes, it is not necessary to complete financial information in Sections I & II on Pages 2 & 3 of this form.

**Explanation of Need:** Attach separate letter describing the needs and what caused the financial distress.

**Lodge / Chapter Actions** Date of Stated Meeting Vote: February 29, 2017  
 (Lodge/Chapter contributions, Matching Funds, etc.)  
Lodge donated \$500 from treasury and passed the hat raising an additional \$250 and applied for Matching funds in the amount of \$750. Total donation \$1,500.00

Needs Lodge/Chapter cannot provide and approximate cost: (attach copies of estimates, bills, etc.)

<u>Bathroom door width needs to be increased to allow wheelchair entry.</u>	\$	<u>4,000.00</u>
_____	\$	_____
_____	\$	_____
Approximate Total Requested	\$	<u>4,000.00</u>

**Lodge / Chapter - Information**

Lodge/Chapter Name Hometown Lodge 560

Mail:

Physical Address: 501 S. Main Street P. O. Box: 560 City: Somewhere State: OK Zip: 74000

**Lodge / Chapter - Contact Information**

Worshipful Master (or) Worthy Matron Signature: \_\_\_\_\_

Telephone: Preferred:  Work  Cell

Home Number: \_\_\_\_\_ Work \_\_\_\_\_ Cell (405) 555-9876

e-mail bmal@gmail.us Fax No. \_\_\_\_\_

Secretary Signature: \_\_\_\_\_ (SEAL)

Telephone: Preferred:  Work  Cell

Home Number: \_\_\_\_\_ Work \_\_\_\_\_ Cell (405) 555-5432

e-mail omal@gmail.us Fax No. \_\_\_\_\_

Promises Matter Grant Application for Mary A. Gooden

**SECTION I**

**Financial Information**

(NOTE: It is not necessary to complete this section if applicant receives Medicaid)

**Assets**

	Amount
Checking	\$ 105.00
Savings (Money Market, CD Value, Savings Acct, etc.)	\$ 300.00
Securities (Stocks, Bonds, etc.)	\$ 0.00
Real Estate	\$ 60,000.00
Vehicles	\$ 2,000.00
Retirement (Pension, 401K, IRA)	\$ 0.00
Life Insurance (Cash Value)	\$ 0.00
Other assets (List) <u>HHG</u>	\$
	\$
<b>Total Assets:</b>	<b>\$ 62,405.00</b>

**Liabilities - secured**

	Monthly Payment	Balance
Real Estate	\$ 0.00	\$
Other Real Estate	\$	\$
Vehicle #1	\$ 0.00	\$
Vehicle #2	\$	\$
Other: (List)	\$	\$
	\$	\$
	\$	\$

**Liabilities - unsecured** (Includes credit cards)

Creditor: (List) <u>hospital</u>	\$ 30.00	\$ 400.00
<u>pharmacy</u>	\$ 25.00	\$ 150.00
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
<b>Total unsecured payments:</b>	<b>\$ 55.00</b>	<b>Total Liabilities: \$ 550.00</b>

TOTAL ASSETS:	\$ 62,405.00
LESS: TOTAL LIABILITIES:	- \$ 550.00
<b>NET WORTH:</b>	<b>\$ 61,855.00</b>

Promises Matter Grant Application for Mary A. Gooden

**SECTION II**

**Household Monthly Budget**

(NOTE: It is not necessary to complete this section if applicant receives Medicaid)

Income

	<u>Monthly Amount</u>
Salary/Wages	\$ 0.00
Investment Income	\$ 0.00
Retirement & Social Security	\$ 1,400.00
Other (List)	\$ _____
_____	\$ _____
_____	\$ _____
Total Monthly Income: \$ <u>1,400.00</u>	

Expenses

	<u>Monthly Payment</u>
Home (Mortgage or Rent)	\$ 0.00
Vehicle Loan	\$ 0.00
Other Secured payments (from page 2)	\$ 0.00
Unsecured payments (from page 2)	\$ 55.00
Vehicle (fuel, etc.)	\$ 50.00
Utilities - Electric	\$ 125.00
Utilities - Gas	\$ 75.00
Utilities - Water, etc.	\$ 60.00
Telephone	\$ 70.00
Food	\$ 300.00
Medical - Hospital/Clinic	\$ 40.00
Medical - Doctors	\$ 0.00
Medical - Medications	\$ 0.00
Insurance - Home	\$ 90.00
Insurance - Medical	\$ 0.00
Insurance - Life	\$ 0.00
Insurance - Vehicle	\$ 60.00
Other (List) R/E tax	\$ 80.00
Other (List) yard	\$ 50.00
Other (List)	\$ _____
Total Monthly Expense: \$ <u>1,055.00</u>	

DISCRETIONARY FUNDS:

\$ 345.00

**SECTION III**

Federal income taxes filed through 20 16. Additional owed?  No  
 Yes \$ \_\_\_\_\_

Has the undersigned been involved in a bankruptcy proceeding?  No  
 Yes Date \_\_\_\_\_

**SECTION IV**

The financial information

**SIGNATURES:**

Recipient Her

Date \_\_\_\_\_

Witness You

(Revised 5/30/12)

## **STUDENT OF TODAY/TEACHER OF TODAY (SoT/ToT)**

This program seeks to recognize exceptional students and teachers in local communities.

### **Step 1: Lodge receives program package in the mail**

Every February your Lodge will receive a package announcing the opening of the SOT/TOT. It will contain instructions for the public schools in your area to submit nominations for their winners.

### **Step 2: Lodge representative visits each assigned public school no later than April 1<sup>st</sup>.**

Speak to a principal, counselor, or superintendent about the program. Give them a copy of the nomination instruction sheet. Arrange a presentation date (usually a school awards ceremony.)

### **Step 3: Schools enter nominations online; Lodge confirms presentation arrangements.**

For each nomination made, the Lodge will receive a letter detailing the school name, winner names, presentation details, and the contact information for the school representative responsible for the nominations. It is important that the Lodge contact the school at this time to confirm presentation details and to let the school know if a Lodge member will be present at the awards assembly. Each school receives a similar letter confirming the nomination and listing the Lodge secretary's contact information.

### **Step 4: Certificates are mailed. (Check presentation dates!)**

Each Lodge has stated its preference for certificates mailed to the Lodge or directly to the school. Your Lodge's current preference is indicated in the pages that follow. This may be changed at any time.

*Please note:* Certificates are mailed to Lodges so you can be involved in presentation of the awards. If your Lodge commits to present certificates, please make sure representatives are present at the school's designated ceremony. It is problematic to both the Lodge and the Fraternity when a school calls our office to complain because the Lodge did not attend the awards ceremony to recognize students. If a Lodge no-shows an event or fails to deliver certificates in a timely manner, future certificates will be mailed directly to the school.

### **Step 5: Presenting the awards**

Your Lodge may vote to frame certificates or give cash awards. A Lodge may apply for matching funds for awards to individuals that are over \$100 each.

If a Lodge member is asked to speak as part of the award presentation, some possible talking points are:

- Masons have a worldwide membership of 6 million men and our philanthropy is worldwide.
- Oklahoma Masonry supports a number of public education programs, including the Superintendent's Teacher of the Year, Arts Excellence Awards, and Payne Education Center teacher trainings.
- Masons provide scholarships and support for 4-H, FFA, and other programs benefitting education.
- The Masonic Fraternity has established education endowments at every publicly funded university and college in Oklahoma.

Your Lodge may wish to host its own award ceremony and invite students, parents, and teachers to the Lodge or other facility for a reception or dinner. Arrangements for invitations to participants and their families are the responsibility of the Lodge and may require coordination with the school.

**Step 6: Thank school administrators and ask them to participate in other fraternity programs.**

- Senior Essay Contest is available to all high school seniors. Cash prizes are given to statewide winning schools and students. (See page 29 for more details.)

**Program Guidelines:**

- Schools select SOT/TOT winners. Any reasonable criteria set by the schools may be used such as GPA, volunteering, activities, etc.
- Schools are asked to recognize one (1) male student and one (1) female student, but there is no limit to how many students a school may recognize.
- Presentation: There is no deadline for nominations. We ask that nominations be submitted two (2) weeks be prior to presentation for processing and mailing. Certificates will not be mailed express or overnight due to postage cost.
- Electronic submission is required. Schools with more than eight (8) nominations may contact the Foundation office for a bulk submission template. Paper nomination forms will not be processed.

More information is available for teachers on our website! Go to [www.mcfok.org](http://www.mcfok.org), click **Foundation Programs** and find the link for **Student of Today and Teacher of Today**.



# SENIOR ESSAY CONTEST

**August: Visit your local public High Schools at the beginning of the school year.**

Senior Essay packets are mailed to all Oklahoma Lodges. **This essay contest is open to all seniors in Oklahoma Public Schools.** Lodges are instructed to deliver these packets to their local high schools. The deadline for essay entries is usually the end of October. Essays are graded in November and December with results being announced in late January or early February.

Below is a list of what the Lodge needs to do to participate:

- Once the packet is received by the Lodge in August, take the teacher kit to the High School English teacher by the first week of school.
- Send all essays electronically to the Masonic Charity Foundation. The Lodge DOES NOT GRADE THE ESSAYS. All essays will be graded in November and December.
- Local division winners will be announced by February. Certificates will be furnished for presentation by the Lodge for the local division winners in April.
- Your Lodge will also be notified if you have any statewide winners. Checks and certificates will be furnished for the statewide winners in April.
- In the Spring, contact your local school(s) to make arrangements to present the certificates at an awards assembly.

Requirements:

- Any Oklahoma **public school** senior is eligible and may submit one entry.
- Essays must be submitted online at [www.MCFOK.org](http://www.MCFOK.org) using .doc, .pdf or google doc. No other forms will be accepted.
- **The deadline for submission is October 31.**
- Essays must be the student's original work.
- The essay must be 1000-1250 words typed, double spaced, Times New Roman, font size 12. Essays that don't meet the 1000-1250 word count will be disqualified.
- A bibliography page listing all referenced sources in an accepted format is required. The word count does not include the bibliography.
- Essays will be professionally judged based on adherence to the assigned topic, organization of material, interest, originality, spelling, grammar, and neatness.
- Entries become the property of the Masonic Charity Foundation of Oklahoma and will not be returned.

# MASONRY IN ACTION

**Application deadline is March 31<sup>st</sup>**

The Masonry in Action Award has two primary purposes:

1. To recognize Lodges who participate at an exceptional level in Masonic Charity Foundation programs
2. To encourage Lodges to review their participation in MCFOK programs and see where they can do more

## **Program Highlights:**

Two winning Lodges are selected each year:

- One small Lodge (fewer than 100 members)
- One large Lodge (100 or more members)

The charitable or educational cause of the Lodge's choice is honored with \$5,000 in grant funds to. Grant funds may be shared with as many organizations as the Lodge chooses. The Lodge is encouraged to select organizations in its local area but can designate any charitable recipient. Past winners have chosen to give grant funds to public libraries, volunteer fire departments, public schools, community youth/family centers, and food pantries.

## **How are winners selected?**

Each application is scored based on an objective set of criteria which measures participation in Foundation programs. To maximize your Lodge's chances of being honored, we recommend the following tips. Not ALL of these things must be done to receive the Masonry In Action Award; this is just a guideline to see where your Lodge can participate more fully:

- 1. Utilize Promises Matter Grants AND Promises Matter Matching Funds.** Highest priority is given to Lodges who fulfill the fraternal obligation to care for brothers and their families. You have \$12,500 in Matching Funds available to help a brother every year; have you checked with your absent brothers to see if they are in need?
- 2. Support the Grand Master's Charitable Appeals.** For the last several years, these include the OETA and Food Bank campaigns. This may also include disaster relief campaigns and the new FFA Endowment campaign.
- 3. Interact with your public schools.** Do you encourage your local schools to participate in the Senior Essay and Student of Today programs? Does a member of your Lodge personally attend the awards ceremony to present certificates to winners? Does your Lodge offer prizes to winners or frame certificates?
- 4. Community fundraisers.** Make it a goal to maximize Matching Funds usage every year. Use every fundraiser as an opportunity to give your Lodge community presence: is your Lodge's charitable work featured in the local paper? Is the community present at awards ceremonies? Are you sharing pictures and Lodge accomplishments on social media?

# MASONIC CHARITY FOUNDATION PHOTO CONTEST

Send us your favorite photos representing Oklahoma, Freemasonry, Community, or anything else!

## RULES AND SPECIFICATIONS:

- Submit photos **electronically** by **July 15<sup>th</sup>** via email to [information@mcfok.org](mailto:information@mcfok.org)
- Files must be JPEG or PNG file format.
- 300 dpi and a maximum 4 photos
- **Landscape orientation is required.** Portrait will be automatically disqualified.
- Submit files with the largest size/resolution possible to allow high-quality enlargement and reproduction.
- Include: location, lodge, date, and photo title.
- Submission of photo entries constitutes express permission for the Masonic Charity Foundation to reproduce photos and consent of use.
- Winning photos will be showcased in the Masonic Charity Foundation Annual Report calendar, at [www.mcfok.org](http://www.mcfok.org) and on social media sites.



Sunrise over Darlington Chapel 2018 Photo Contest Winner