

APPEAL

MAKING A DIFFERENCE



Steward Training

Saturday 22<sup>nd</sup> July 2023 Goldsmith Street Nottingham



## Festival Steward Training

Welcome

W. Bro. Martin Johnson

Festival Director



## **Support Network**

Lodge Festival Stewards

Hall Stewards

Festival Committee



Executive	Committee
LACCUUIVC	

Director W. Bro. Martin Johnson Secretary W. Bro. Jim Crossley W. Bro. Roy Goldsbrough Finance Comms W. Bro. Oliver Rainbow/Rob Smith **Events** W. Bro. Paul Simpson Byron Club Bro. James Hague Charity /Events W. Bro. Kevin Hyland W. Bro Andy O'Hagan Logistics MCF W. Bro. Bob Wyatt



## Seminar Agenda

- Understanding the Festival System
- The MCF
- Our Targets
- Administration
- PR & Marketing
- Events
- Questions & Answers



Why are Festivals required?



Festivals are required to alleviate the gap between the expenditure from reserves and the income from investments.



### What is a Festival?

A Festival is the culmination of a 6-7 year fundraising period of a Province where <u>additional</u> charitable giving is concentrated towards what is now the:





Approx every 11 years a Festival is awarded to a Province

Previously, a province was awarded one of the four main charities in turn.







#### The Four Previous Charities

## Masonic Samaritan Fund





Royal Masonic Benevolent Institution

**Grand Charity** 





Royal Masonic Trust for Boys & Girls



# Those four Masonic Charities are now combined into one:



#### A Jewel in the Crown of Masonic Charities :-



The oldest Masonic Charity was established in the late 18thc

HRH Duchess of Cumberland was the Trusts first Patron

Chevalier Ruspini, Freemason formed the first school

The Royal Masonic Institute for Girls was formed in 1788

The Royal Masonic Institute for Boys was formed in 1798

Both merged in 1980 as the RMTG&B

Re-emerged in 2016 as the Masonic Charitable Foundation

## Royal Masonic Institute for Girls





This picture shows
Ruspini leading
the girls into
Grand Lodge in
the presence of
HRH Prince of
Wales

## Nottinghamshire Festivals

Year	No. Lodges	Charity	Amount	2023 Value
1909	21	RMBF	£31,105	£4.7m
1932	49	RMBI	£72,324	£6.4m
1944	54	RMI for Boys	£138,887	£7.8m
1961	67	RMI for Girls	£226,036	£6.4m
1977	87	RMBI	£730,924	£5.8m
1991	98	RMTGB	£2,224,194	£6.1m
2007	96	RMSF	£3,700,000	£6.5m
2018	90	RMTGB	£2,700.000	£3.5m
2029	80	MCF	???	???

Talent Aid- for Masonic Children Sports, Music, Theatre

Lifelights – Fund to Children's Hospices for Computers, touch Screens etc

Stepping Stones

Choral Bursaries
– provides funds at
22 cathedrals

New Support for Post Graduates

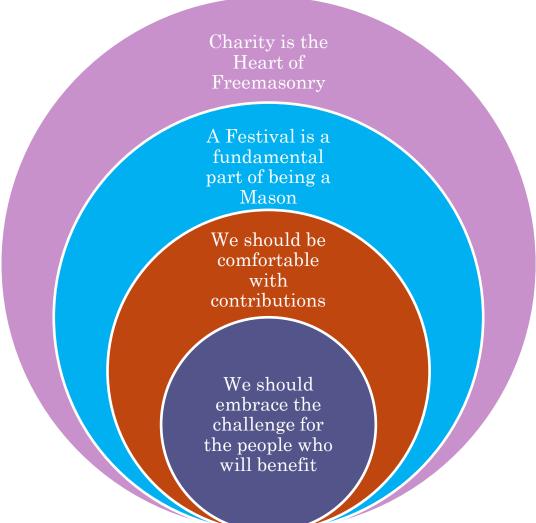




Help make a child smile

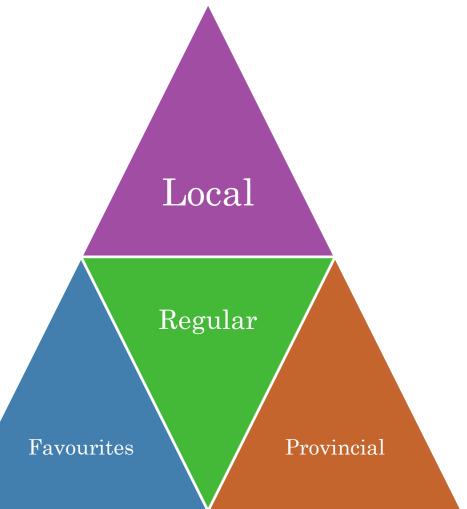
## Festival Contributors Members Royal Donations Arch RCC Halls MCF Rose Lodges $\operatorname{Croix}$ Wine Events







Lodge Charities whilst in Festival







Who are the MCF?
What is expected of us?
When do we need to deliver?
How much do we need to contribute?



## The MCF, the Freemasons' charity

#### Paul Crockett

Head of Fundraising

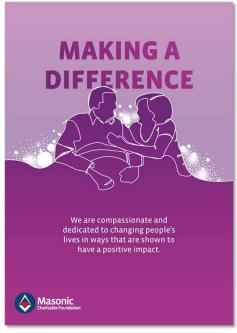


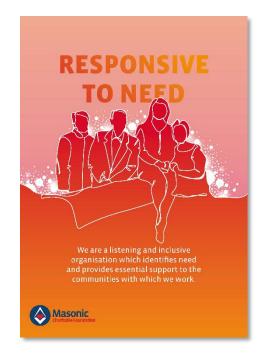




#### What is the MCF?











#### How does the MCF do what it does?





#### What does the MCF do?

Since MCF....

£130million or £50,000 per day!

Top 25 UK Grant Makers





#### What does the MCF do?

#### Operates efficiently

6p in every £1 on administration

**Creates Impact** 





#### What does the MCF do in Nottinghamshire?

In the current year.....

17 Grants to Freemasons and families

• £25,000

Since MCF.....

459 Grants to Freemasons and families

• £1million





#### Case History







#### Masonic support







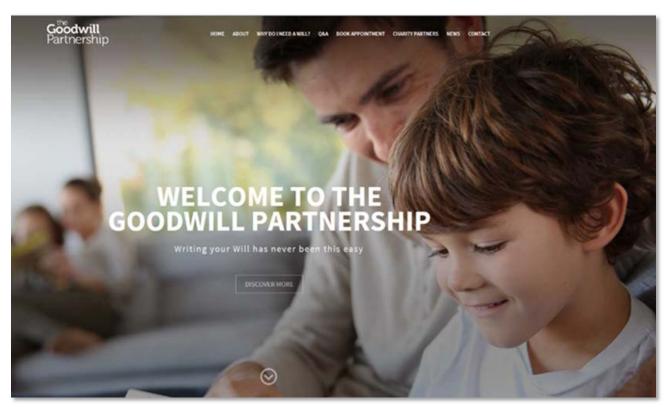
#### Local charity support







#### Will writing provision







Advise and Support Team





#### Mental Health Programme





#### Talent Aid





#### Funding PhD students







#### Disaster relief





#### The MCF, The Freemasons' Charity







#### The Festival system







#### What can you do?





#### The Festival system





### Raising funds









### Why do people give?





# How do people give?





## How do people give?





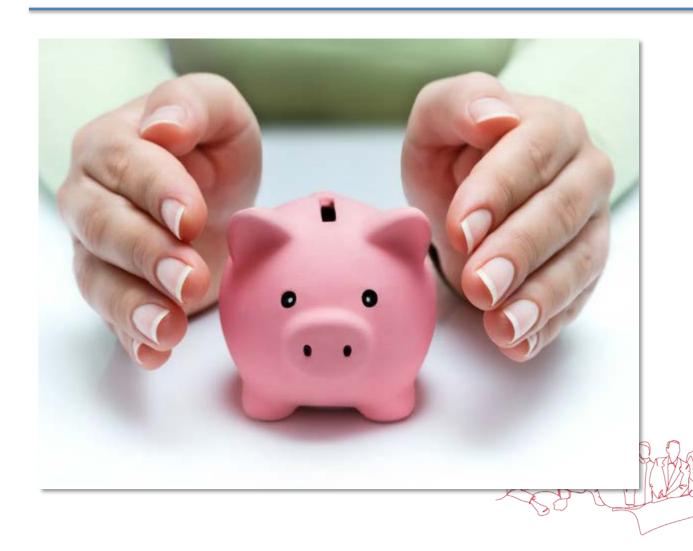
#### MCF resources!





# Relief Chest Scheme

#### The Relief Chest





# Relief Chest Scheme

#### The Relief Chest







#### The Relief Chest



#### Select an option to get started

#### Scheme

sy. We help you give, thereby uses about which you are passionate

#### **Appeals**

As well as supporting the work of the MCF, freemasons are dedicated to fundraising for national appeals and campaigns on behalf of other charities.

**VIEW ALL** 

#### **Festivals**

Donate, fundraise or learn more about your Pro Festival Appeal for the MCF









#### The Relief Chest







#### Fundraising Hub

# https://mcf.pagetiger.com/fundraising











Our 'Target'

Secretary

WBro. Jim Crossley





Targets
or
NO Targets?

All of the empirical evidence <u>clearly</u> shows that with Targets, there is more focus and consequently everyone is far more likely to achieve the end objectives!





**Targets** or No Targets? Nottinghamshire has held 8 Festivals since 1909 all of which have been monetary targets set at Provincial and Lodge levels based on membership numbers





The total raised in 2018 was:

£2,700,000.00

What is ours for 2029?



#### **Negative Considerations**

 Starting membership is lower than when we finished the 2018 Festival 2943 - 2012 2167 - 2023

- Harsher economic climate
- Last Festival was only 4yrs ago
- The length of the Festival is shorter at 6yrs



#### **Positive Considerations**

• Interest Rates are better than at the start of the last Festival

0.5% - 2012 5% - 2023

- Companion Orders <u>members</u> are not being asked to contribute
- Companion Orders have pledged their support



#### **Contributions**

- 1/3 will
- 1/3 probably will
- 1/3 probably will not

#### Target



• The likelihood is therefore that only up to 66% of the membership will contribute

Target



#### Other Considerations

Targets
or
No Targets?

#### But

does the target have to be purely monetary?

**Target** 





# 2018 Festival



# Honorific levels achieved:

· Vice Patron

Patron

Grand Patron

26%

13%

9%

**62**%



# The PGM's approach to the 2029 Festival Target is not ony realistic but

# 'Novel'

Your Target is achieving the best percentage of participation by your lodge members across the Honorific levels (Between 66% - 100%)

The Lodge Target is therefore the total achieved from donations made across those Honorific levels

The Province does not have a Target as such, only an anticipation that:-

YOUR Success is OUR Success



#### 2029 Membership Giving at 2018 levels

Honorific	Level	With Tax Relief	Month	Week	Day	% of Members		Tax Relief	Total
						62			
Steward	£480.00	£600.00	£6.67	£1.54	£0.22	14	£145,689.60	£36,422.40	£182,112.00
Vice Patron	£720.00	£900.00	£10.00	£2.31	£0.33	26	£405,849.60	£101,462.40	£507,312.00
Patron	£1,080.00	£1,350.00	£15.00	£3.46	£0.49	13	£305,909.14	£76,477.28	£382,386.42
Grand Patron	£1,440.00	£1,800.00	£20.00	£4.62	£0.66	9	£285,201.44	£71,300.36	£356,501.80
							£1,142,649.78	£285,662.44	£1,428,312.22



#### 2029 Membership Giving 100%

Honorific	Level	With Tax Relief	Month	Week	Day	% of Members		Tax Relief	Total
						100			
Steward	£480.00	£600.00	£6.67	£1.54	£0.22	100	£1,040,640.00	£260,160.00	£1,300,800.00
Vice Patron	£720.00	£900.00	£10.00	£2.31	£0.33		£0.00	£0.00	£0.00
Patron	£1,080.00	£1,350.00	£15.00	£3.46	£0.49		£0.00	£0.00	£0.00
Grand Patron	£1,440.00	£1,800.00	£20.00	£4.62	£0.66		£0.00	£0.00	£0.00
							£1,040,640.00	£260,160.00	£1,300,800.00



#### 2029 Membership Giving at 100%

Honorific	Level	With Tax Relief	Month	Week	Day	% of Members		Tax Relief	Total
						100	+38%		
Steward	£480.00	£600.00	£6.67	£1.54	£0.22	52	£541,132.80	£135,283.20	£676,416.00
Vice Patron	£720.00	£900.00	£10.00	£2.31	£0.33	26	£405,849.60	£101,462.40	£507,312.00
Patron	£1,080.00	£1,350.00	£15.00	£3.46	£0.49	13	£304,387.20	£76,096.80	£380,484.00
Grand Patron	£1,440.00	£1,800.00	£20.00	£4.62	£0.66	9	£280,972.80	£70,243.20	£351,216.00
							£1,532,342.40	£383,085.60	£1,915,428.00



To Qualify as Steward

£1.54 per WEEK is a pkt of McVities Biscuits

To Qualify as Vice Patron

£2.30p per WEEK is a Millionaire Shortbread

To Qualify as Patron

£3.45p per WEEK is a Costa Flat White Coffee

To Qualify as Grand Patron

£4.60p per WEEK is a pint of Guinness











#### To Qualify for Steward

22p per DAY is the equivalent of a Bread Roll

£1.54 per Week is the equivalent of ½ Pint

£6.67 per Month is the equivalent of 8 cigarettes









#### To Qualify for Vice Patron

33p per DAY is the equivalent of ???

£2.31 per Week is the equivalent of ???

Equate the costs per Day, Week and Month to an item they would not necessarily miss

£10 per Month is the equivalent of ???



#### To Qualify for Patron

49p per DAY is the equivalent of ???

£3.36 per WEEK is the equivalent of ???

Equate the costs per Day, Week and Month to an item they would not necessarily miss

£15 per MONTH is the equivalent of ???



### **To Qualify for Grand Patron**

66p per DAY is the equivalent of ???

£4.62 per WEEK is the equivalent of ???

Equate the costs per Day, Week and Month to an item they would not necessarily miss

£20 per MONTH is the equivalent of ???



Choose the number of Months you wish to donate to the level of Steward

See the Cost per Month, Week and Day

Steward						
Total	£480					
Gift Aid	£120					
Total	£600					
Months	Month	Week	Day			
72	£6.67	£1.54	£0.22			
66	£7.27	£1.68	£0.24			
60	£8.00	£1.84	£0.27			
54	£8.89	£2.05	£0.30			
48	£10.00	£2.30	£0.33			
42	£11.43	£2.63	£0.38			
36	£13.33	£3.07	£0.44			
30	£16.00	£3.68	£0.53			
24	£20.00	£4.60	£0.66			
18	£26.67	£6.14	£0.88			
12	£40.00	£9.20	£1.32			



Choose the number of Months you wish to donate to the level of Vice Patron

See the Cost per Month, Week and Day

Vice Patron						
Total	£720					
Gift Aid	£180					
Total	£900					
Months	Month	Week	Day			
72	£10.00	£2.30	£0.33			
66	£10.91	£2.51	£0.36			
60	£12.00	£2.76	£0.40			
54	£13.33	£3.07	£0.44			
48	£15.00	£3.45	£0.50			
42	£17.14	£3.95	£0.57			
36	£20.00	£4.60	£0.66			
30	£24.00	£5.52	£0.79			
24	£30.00	£6.90	£0.99			
18	£40.00	£9.20	£1.32			
12	£60.00	£13.80	£1.98			



Choose the number of Months you wish to donate to the level of Patron

See the Cost per Month, Week and Day

Patron						
Total	£1,080					
Gift Aid	£270					
Total	£1,350					
Months	Month	Week	Day			
72	£15.00	£3.45	£0.50			
66	£16.36	£3.77	£0.54			
60	£18.00	£4.14	£0.60			
54	£20.00	£4.60	£0.66			
48	£22.50	£5.18	£0.74			
42	£25.71	£5.92	£0.85			
36	£30.00	£6.90	£0.99			
30	£36.00	£8.28	£1.19			
24	£45.00	£10.35	£1.48			
18	£60.00	£13.80	£1.98			
12	£90.00	£20.70	£2.96			



Choose the number of Months you wish to donate to the level of Grand Patron

See the Cost per Month, Week and Day

Grand Patron						
Total	£1,440					
Gift Aid	£360					
Total	£1,800					
Months	Month	Week	Day			
72	£20.00	£4.60	£0.66			
66	£21.82	£5.02	£0.72			
60	£24.00	£5.52	£0.79			
54	£26.67	£6.14	£0.88			
48	£30.00	£6.90	£0.99			
42	£34.29	£7.89	£1.13			
36	£40.00	£9.20	£1.32			
30	£48.00	£11.04	£1.58			
24	£60.00	£13.80	£1.98			
18	£80.00	£18.40	£2.64			
12	£120.00	£27.60	£3.95			



Individual contributions and records must be kept confidential

The Festival
Treasurer will notify
each on attaining
their honorific level
and supply the jewel.



# Throughout the Festival it will be YOUR job to:

Report to the Province as to Overall progress OF YOUR LODGE



# Effective Fundraising and Administration

Festival Treasurer

W. Bro. Roy Goldsbrough



## Communications.

E-mail is the primary method of communication.

Festival Stewards should be on e-mail

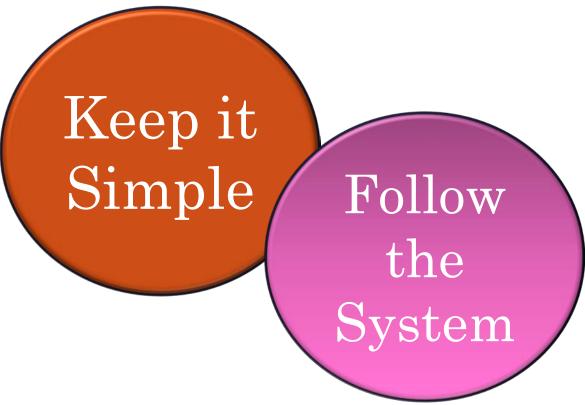
All reports, notices etc. will be distributed by email

There is a box in the Provincial Office at Goldsmith Street where you can leave hard copy for me.











Lodge Festival Steward Forms	
Regular Donations by Direct Debit	
Personal Donations	
Gift Aid Envelopes	
Sponsorship Forms	
QR Code	
Lodge Relief Chests	
Lodge Donations	



## Sponsorship Form

#### Gift Aid Sponsorship Donation forms:

- ✓ Please complete details
  - 1 the event
  - personal
  - Lodge name and number at the top of the form
- ✓ Each donor must complete their entry personally in order to claim Gift Aid, providing all requested information
- Please bank all raised cash and issue a cheque payable to "The Relief Chest Scheme" or a bank transfer for the total amount
- ✓ Complete the Verification Schedule and send together with the completed Sponsorship form and cheque to the Relief Chest office

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## Sponsorship Form

#### Online Sponsorship Pages:

Individuals taking part in sponsored events for the Festival can create their own fundraising pages or sponsor a fundraiser.

https://donate.givetap.co.uk/f/masonic-charitable-foundation/fest2029-nottinghamshire-2029-festival

- ✓ Select "Become a fundraiser"
- ✓ Create an account
- ✓ Follow the instructions and fill in details of the sponsored event and goal amount.
- Under page options, add the Lodge number to be credited on the end in the URL box. This will ensure the right Lodge is credited for honorific purposes.
- Save the page and start fundraising.
- Participants can log in and make updates and changes to their page and upload progress photos at any time.
- Donors can Gift Aid any donation they make.



## Single Donations Form

ersonal Details—		This form is for personal donations only				
ersoriai Details—						
First name						
Last name						
Address						
Postcode						
Onation Details—						
I enclose:	a cheque a charity w	oucher (e.g. CAF/KKL)				
Donation amount £ Please ensure the cheque is made payable to the Relief Chest Scheme.						
Lodge/Chapter name						
Lodge/Chapter no. Relief Chest No. FEST2029						
Boost your donation by 25p of Gift Aid for every £1 you donate  If you are a UK tax payer, under the Government's Gift Aid Scheme, the Relief Chest Scheme (The Grand Charity Registered Charity Number 281942) can reciaim the tax you have already paid on your donation and add it to the value of your gift. Gift Aid is reciaimed by the charity from the tax you pay for the current tax year. Your address is needed to identify you as a current UK taxpayer.  Please read the declaration below before you tiok the relevant box(es) and date the form.  I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.  Please treat as Gift Aid donations, all qualifying gifts of money made:						
On this donation	n only in the future	in the past 4 years				
If you do <u>not</u> wish for tax to be reclaimed, please tick here:						
Signature		Date				



## Single Donations Form

#### Single donation by Credit/Debit card:

- Post: Complete card details and the amount to be donated.
  - If the donor wishes to Gift Aid the donation, the details as listed above must be present
  - Post the completed form to the Relief Chest Office
- ✓ Telephone: Donations can be made by calling 020
  3959 2807 (open Monday-Thursday 9.30am-4.30pm,
  Friday 9.30am-3.30pm).

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✓ Online: Card donations can be made by visiting https://donate.givetap.co.uk/f/masonic-charitable-foundation/fest2029-nottinghamshire-2029-festival



#### Single donation by Cheque/Charity voucher:

- ✓ Complete the Single Donation form or Combined Single & Regular Donation form.
- ✓ Make all cheques and vouchers payable to "The Relief Chest Scheme"
- If the donor wishes to Gift Aid the donation, the following details must be completed:
  - Full name and Address
  - Tick the relevant box
  - Date the form.
- ✓ Enter the Lodge/Chapter to be credited.
- Post the completed form and cheque to the Relief Chest office.

## Single Donations Form





Enter your bank details on the Direct Debit Mandate sign and date ensuring that the information is correct and legible.

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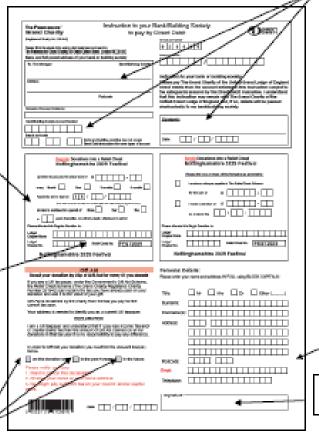
#### KEEP THIS TEAR OFF SUP It is your Guarantee

Enter the donation details.

- a) Amount.
- b) how often
- c) how long.

#### Enter your Lodge/ Chapter name and number for honorific purposes

If you are UK tax payer the MCF can reclaim Gift Aid on your donations. Tick relevant box/es



Enter your personal details. Please make sure that we can read. the details. Print clearly.

Sign and date the form.

## Regular Donations Form



#### Regular Donations by Direct Debit

#### Online:

- ✓ Set up a Direct Debit Instruction by visiting:
  - https://donate.mcf.org.uk/festival-or-appeal/?festivalId=19505



#### By telephone:

- Call our dedicated line on 020 3146 3345 (Open Monday to Thursday 9:30am to 4:30pm, Friday 9:30am to 3:30pm)
- The donor must have the following details to hand:
  - Full name and Address
  - Bank account number and sort code
  - Donation amount, frequency and duration of Direct Debit
  - Relief Chest number (FEST2029) into which your donation is to be made
  - Details of your Lodge/Chapter
- Please note that calls will be recorded in accordance with Direct Debit & Gift Aid rules

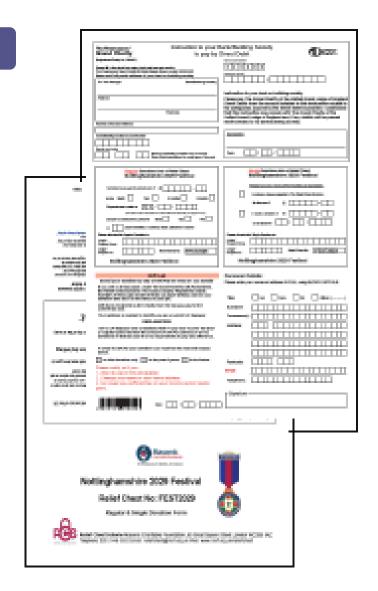
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#### Regular Donations by Direct Debit

#### By post:

- The donor must complete details of the account to be debited and sign and date the Direct Debit mandate at the top of the form
- ✓ Enter the following details:
  - Amount
  - Frequency
  - Length of the Direct Debit Instruction
- Fill in the personal details and tick the Gift Aid box if applicable
- Send the completed form to the Relief Chest office.





## Handling objections to giving

"I can't afford to make a regular donation"

> Use the breakdown slides that equate each Honorific level by Month, Week and Day to a particular everyday commodity

> > It is a question of choice and priority".



## Handling objections to giving

"I can't afford £x as a lump sum"

"Consider paying monthly to spread the giving".



#### Gift Aid – Special Circumstances

If you come across an unusual tax situation don't hesitate to contact us for help.

#### Nottinghamshire 2029 Festival

Donation £

Please re-Please tre could false

Relief Chest No.

Post Code Lodge or

Chapter No.

(The Coard Charity-Registered

Relief Chest A common situation:

Thank • Wife pays tax but husband does not. Please complete this slip in BLOCK capitals and p Husband can still claim his Festival Jewel First Name in full or higher honorific by following a simple Surname procedure. House Name or No. Address

- 1. Wife completes gift aid form in her name.
- 2. Wife sends covering letter to MCF with gift aid form or envelope stating that donation is to be recorded in her husband's name.



### Gift Aid Envelope – Step by Step

1.

Each person
donating by this
method
completes his
details on the
back of the
envelope and
puts in cash or
cheque.

If cheque, this must be made payable to the Lodge etc

2.

Charity Steward and/or Treasurer open and count the contents from each envelope (preferably, two people together)

Entering the amount on the back of the envelope in the top right hand corner.

3.

Money is banked into the Lodge etc bank account and the "ENVELOPE

&

DONOR VERIFICATION FORM"

must then be completed.

(There is no requirement to list, name or prepare a separate schedule of individual envelopes as the Trust will do so)

4.

Lodge etc draws a cheque made payable to the "Relief Chest" on the Lodge etc bank account for the total amount.

5.

The Cheque, Envelope

Envelope

&

Verification Form PLUS <u>ALL</u> the opened envelopes should then be forwarded by post to:

Festival Treasurer Roy Goldsbrough



## Gift Aid Envelopes

Use for one-off, small or large donations and adds 25% to every donation.

Supplies available from Hall Stewards or the Festival Secretary.

Using Gift Aid envelopes is straightforward but the correct procedure must be followed, otherwise the Tax cannot be reclaimed by the MCF.



#### Gift Aid envelope



For Freemasons, for families, for everyone

#### Nottinghamshire 2029 Festival Relief Chest No: FEST2029

#### Thank You

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# Festival Jewels and Bars

Jewels will automatically be distributed by the Festival Treasurer when achieving that Honorific level.

Unlike previous Festivals.....there is No Charge for the jewel!





### **Individual Honorifics:**

Steward

• £480 + Gift Aid = £600

Vice Patron

• £720 + Gift Aid = £900

Patron

• £1080 + Gift Aid = £1350

Grand Patron

• £1440 + Gift Aid = £1800

(Lodge)

• Recognition is via Certification



## Spouse/Partners Jewel - free with the donation



Minimum donation to qualify -£50 plus Gift Aid =£62.50p



Need for Visibility Ensure all lodge members are fully informed

Promote the Festival throughout its 6 year duration Advertise any successes and highlight events



Notts Festival Website – Fest 2029.co.uk

Web Master – James Hague Email:jameshague89@icloud.com

Regular updates needed, events, calendar, news information etc





## Tools Available

Restival Pop -up stands

Gazebo / pop – up shelter

Gift aid envelopes



## Communications

 $\overline{\mathrm{PCO}}$ 

W. Bro. Rob Smith



## Communicate!

Tell us what you are doing and we will promote your events

Give your lodge regular updates, liaise with your Charity Steward

Liaise with Masonic Hall Festival Stewards

Share your events with other lodges

Ask for help. The 2029 Festival Committee is there to help you



# Lodge Events

All Lodges are encouraged to hold their own annual event

Consider holding joint events with other Lodges



# Questions & Answers

&

Closing Comments

# NOTTINGHAMSHIRE 2029 FESTIVAL

APPEAL

MAKING A DIFFERENCE



for attending today

Saturday 22<sup>nd</sup> July 2023 Goldsmith Street Nottingham