



# MONTANA MASONIC FOUNDATION

PO Box 1158 Helena, Montana 59624-1158 (406) 442-7774



**M.A.S.O.N.** (Rev 2008)

## MASONIC ASSISTANCE SUPPORTING OUR NEIGHBORS

### APPLICATION FOR MATCHING FUNDS

In order to qualify for Matching Funds, the LODGE must be actively engaged in raising the money to be matched. This program was designed to encourage Lodges to seek out and find areas charitable need within their local community that are not receiving assistance and funding through normal means and to provide some level of matching of Lodge funds from the Montana Masonic Foundation to meet the need. The recipient of the program may be non-Masonic or Masonic. The intent is not to fund efforts that are receiving or can receive funding support from state or federal sources or even other Masonic sources but, rather to meet a charitable need in other areas that are not being met that deserve financial assistance.

**Please carefully read the instructions and conditions on Page 3.**

The Lodge must vote 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)

Date Lodge voted at a stated meeting to help the recipient: \_\_\_\_\_

### RECIPIENT INFORMATION

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

Name(s) of Recipient: \_\_\_\_\_

Explanation of Need (why is it charitable or educational): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Date of Presentation: \_\_\_\_\_

(Give specific date or "when funds are received")

*If you have questions about whether certain funds qualify for matching, call the Montana Masonic 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.*

## SOURCE OF FUNDS

\$ \_\_\_\_\_ Amount Lodge is contributing. Check mailed to Montana Masonic Foundation for the match.

\$ \_\_\_\_\_ Amount the Lodge is requesting to be matched.

\$ \_\_\_\_\_ Total amount to be given to recipient(s).

Is emergency action required? Yes \_\_\_\_\_ No \_\_\_\_\_

( In case of emergency, call the Montana Masonic Foundation at 406 442-7774, and have all the information completed on the form.)

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 \$ \_\_\_\_\_ Describe fund-raiser (i.e.: breakfast, dinner, auction, bake sale, etc.)

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(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: \_\_\_\_\_

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## SIGNATURES

(Sec. Signature) \_\_\_\_\_ (W.M. Signature) \_\_\_\_\_

(Telephone # - Home) \_\_\_\_\_ (Telephone # - Home) \_\_\_\_\_

(Telephone # - Work) \_\_\_\_\_ (Telephone # - Work) \_\_\_\_\_

*SEAL*

**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.**

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.  
*Please read all instructions carefully*

## MATCHING FUNDS PROCEDURE

1. Pick a cause. This program was designed to encourage Lodges to seek out and find areas charitable need within their local community that are not receiving assistance and funding through normal means and to provide some level of matching of Lodge funds from the Montana Masonic Foundation to meet the need. The recipient of the program may be non-Masonic or Masonic. The intent is not to fund efforts that are receiving or can receive funding support from state or federal sources or even other Masonic sources but, rather to meet a charitable need in other areas that are not being met that deserve financial assistance. Funds are not intended for long term financial assistance to a project.

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 send a check to the Montana Masonic Foundation. If the request is approved the Foundation will return a check with the lodge contribution and the matched fund from the Foundation. If application is not approved the check will be returned to the Lodge.

5. Submit an application for Matching Funds.

6. When received, the check from the Montana Masonic Foundation will be written to the recipient and will also have the name of the presenting Lodge on the check.

7. Present combined check to the recipient.

8. Complete and return the "Completion Form" after the presentation is made.

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In case of emergency, call the Montana Masonic Foundation at (406) 442-7774.

## MATCHING FUNDS RULES & CONDITIONS

A. In order to qualify for Matching Funds the recipient must be charitable in nature and the recipient can be non-Masonic or Masonic, to fill the gaps where charitable assistance can be given to those deserving when the need is not being met.

B. The Montana Masonic Foundation will match local Lodge contributions:  
(a) dollar for dollar up to \$500.00. Each participating Lodge will receive a maximum of \$500.00 in matching funds in any one Masonic year. The Lodge can divide the assistance any way it wants between community and fraternal causes.

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.

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 Montana Masonic Foundation **BEFORE** presenting any funds to the charities.

I. Lodges must certify to the Montana Masonic Foundation that the funds from the Foundation were actually used for the approved purpose by returning the Completion Form enclosed with the Montana Masonic Foundation check. The return address is shown on the Completion Form.

Return completed application to:  
**Montana Masonic Foundation**  
**PO Box 1158**  
**Helena, Montana 59624-1158**  
**(406) 442-7774**

## PARTNERSHIP PROGRAM

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

**Note: 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). The Lodge must have a substantial involvement in the partnership.

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:

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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 which was done by the Lodge, which by the partner(s) and which by both. Please use the blank lines to indicate activities not listed.

<b>LODGE</b>	<b>ACTIVITY</b>	<b>PARTNER(S)</b>
_____	Planned the event	_____
_____	Arranged for 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.

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**PLEASE NOTE:** The request must comply with all the rules and conditions of the program, 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.