



The Relief Chest Scheme

Efficient Masonic Charitable Giving

Over 4,800 Relief Chests
£22.3m available for charitable activities





Relief Chest - Established in 1986

A donor-advised fund, or DAF, is a philanthropic fund held within a charitable organisation, RCS (MCF).

1. You make a charitable contribution.

- You make irrevocable donations.
- You receive tax recognition for donations to the DAF account in the UK.

2. You recommend grants from your account (*Relief Chest*) to qualified charities at any time afterward.

Benefits: Donor-advised funds are increasingly popular giving vehicles in the UK because they offer administrative convenience, cost savings, and tax advantages.





Relief Chest - Established in 1986

Relief Chests by Masonic unit

Lodge Chests	3,581
Chapter Chests	752
Other Masonic Orders	359
Festival, Provincial & Benevolent Fund Chests	148
	<u>4,840</u>





Relief Chest - Established in 1986

- **1 million** transactions per annum
- **£1.3 Million** in gift aid tax relief
- **No administration fee**
- Fully **compliant** (HMRC, CC & ICO) and **risk** management solution
- Relieves the **charity steward** from all admin duties
- Comprehensive **reports** for tracking and traceability of all transactions





Regular or Continuous Giving

A Goal without a Plan is just a wish

- Regular donations are extremely important to a charity and help make a really big difference.
- By choosing to give a regular donation, you will be helping the charity to plan ahead and make long-term improvements.
- Reduce admin costs (overheads).
- Flexibility. Donors can easily increase, decrease, pause or stop their gift at any time.
- Strengthen long-term relationships with donors and the lifetime value of their support.
- Reduce attrition rates.





GDPR – Data Protection Act 2018

In May 2018, the General Data Protection Regulation (GDPR) came into force and this required more stringent measures to protect the personal information and privacy of data subjects. Below are examples of the areas we reviewed as part of our impact assessment programme:

- our approach to personal information
- the privacy notices wherever we collect personal information
- the quality of consent we currently hold
- the functionality and use of our current systems





GDPR – Data Protection Act 2018

PURPOSE FOR PROCESSING PERSONAL INFORMATION

- Our legal basis for collecting, processing and sharing personal information is based on the legitimate interest of the Relief Chest Scheme. To provide you with the services and information you request and for administration and processing purposes, including donations, gift aid tax reclaim, honorifics/patronage, statutory and compliance monitoring.





RCS Digital Online – Fundraising

The expansion of the online donation platform to all Relief Chest holders.

- Create a bespoke template to be replicated and built in bulk for 5,000 Relief Chest holders.
- Improve operational efficiency through encouraging gift aid sponsorships (GAS) via the online platform.
- Streamline the member, supporter and donor journey.





Individual Relief Chest Scheme

<https://mcf.org.uk/individual-relief-chest-scheme/>

Our Individual Relief Chest Scheme (IRC) gives you complete control over how and when you choose to support the causes you care about.





Free service to Masonic Community

- Donation methods, offline and online
- Added value (25%) gift aid tax relief
- Payments / Grants to charities on behalf of the members
- Complete and detailed audit trail of activities (reports)
- Security of data, fully compliant with ICO requirements (DP & GDPR)
- Meeting the requirements of HMRC and Charity Commission
- IT suite/Digital platform

No one ever made a difference by being like everyone else

