.

FREEMASONS CHARITY

Charity Manual

Updated 12 June 2026

Our Mission: *To promote and coordinate Freemasons' benevolence in New Zealand*

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Abbreviations

BoD	Board of Directors
DepGM	Deputy Grand Master
GAlm	Grand Almoner
DivGAlm	Divisional Grand Almoner
GSupt	Grand Superintendent of the Region
LAlm	Lodge Almoner
LCO	Lodge Charity Officer
RCO	Region Charity Officer
TFC	The Freemasons Charity
CMC	Charities Management Committee

Introduction

Welcome to this guideline for your interactions with The Freemasons Charity. These guidelines are designed to inform you about the strategic plans, structure and roles within the Charity, and also to assist you in making an application to the Charity.

Charities in New Zealand

Charities in New Zealand are required to comply with the Charities Act and other legislation and regulations. All funds distributed by Masonic Charities must be applied to three Charitable Purpose criteria that are applicable to Freemasonry;

- Relieving Poverty
- Advancing Education,
- Other Purposes Beneficial to the Community

Regulation Of Charities

Charities Services regulate registered charities in New Zealand. Their focus is on increasing public trust and confidence in the charitable sector through effective regulation. They maintain the Charities Register, the public record of all registered charities operating under the Charities Act 2005.

Trust Deed

A charitable Trust Deed in New Zealand is a legal document that establishes a Trust to hold and manage assets for charitable purposes, governed by the Trusts Act 2019 and the Charities Act 2005.

Vision

The Freemasons Charity is an independent charitable trust which aligns itself fully with the strategic direction of Freemasons New Zealand for the purpose of providing support and improving the lives of New Zealanders.

Charitable Outcomes

The Freemasons Charity has outcome-based criteria aligned with providing support to and improving the lives of New Zealanders. Our grant applications are assessed against the following outcomes:

- Provides relief of need
- Improves the lives of individuals
- Provides benefit to the community
- Involves active participation by Freemasons

THE FREEMASONS CHARITY MISSION STATEMENT

To promote and coordinate Freemasons Charity in New Zealand

THE FREEMASONS CHARITY VISION STATEMENT

The Freemasons Charity is an independent charitable trust which aligns itself fully with the strategic direction of Freemasons New Zealand for the purpose of providing support and improving the lives of New Zealanders.

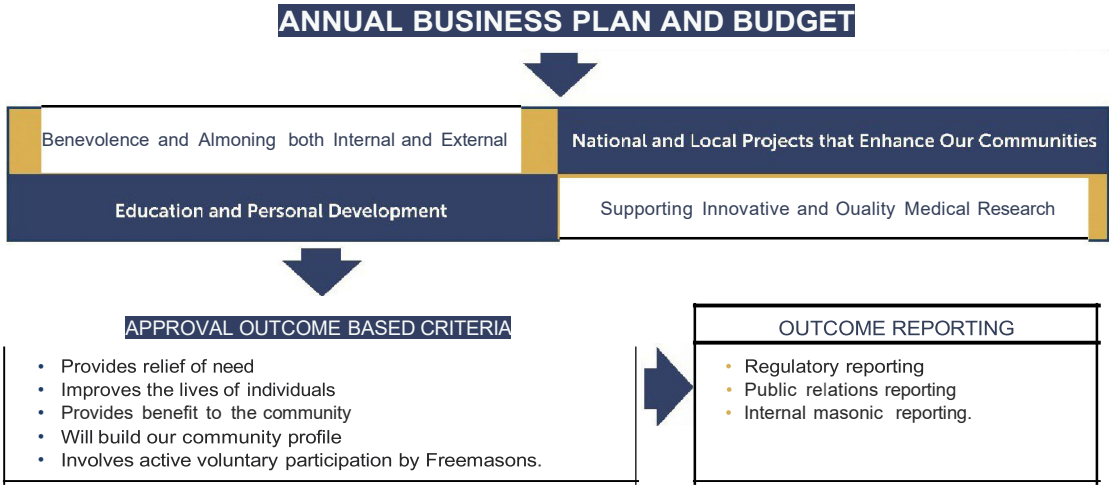
We will use our charitable resources to:

- Win the hearts and minds of Freemasons within New Zealand so that they understand, support, and use their Charity.
- Provide relief to those in need.
- Actively engage with and build relationships within our communities.
- Demonstrate our goodwill by the generous delivery of financial support where needed.
- Encourage education and personal development which will provide long-term betterment for communities
- Support and fund medical research, especially that which is focused on the aged and children.
- Support our Almoners and Charity Officers in the performance of their duties.
- Put into practice the values and principles of Freemasonry and thereby demonstrate to communities the value of our organisation.

We will do this by:

- Prudent management and investment of our available funds.
- Supporting our Lodges, Regions and Divisions with their charitable projects and with their involvement in their communities.
- Taking a long- term holistic approach to all our charitable projects and funding.

STRATEGY PROCESS FLOW DOCUMENT



Core Values of the Charity



Compassion

We are committed to uplifting those in need with empathy, dignity and kindness – putting humanity at the heart of everything we do.



Integrity

We act with honesty, transparency and accountability in all we do, ensuring trust and respect from the communities and partners we serve.



Service

Guided by the Masonic Principle of relief, we dedicate ourselves to meaningful service – supporting individuals, families and causes that build better communities.



Partnership

We believe in the power of collaboration—working with lodges, communities, and national partners to achieve shared goals and greater impact.



Education

We believe in the transformative power of knowledge. By supporting learning and personal development, we empower individuals and communities to grow, contribute, and thrive—honouring Freemasonry's enduring commitment to enlightenment and self-improvement.



Legacy

We honour the Masonic tradition of giving by creating long-term, sustainable change that benefits future generations.

The Freemasons Charity Roles

Board Of Trustees

- Have overall responsibility for governance and operation of the Charity.
- Set up and monitor the SIPO (Statement of Investment Policy and Objectives) agreement for the investment fund(s).
- Have the ability to appoint a Committee to administer the operation of the Trust including the nature and extent of the charitable activities it undertakes, in accordance with the terms of the Trust Deed.
- Approve (if in agreement) the annual budget recommended by the Charities Management Committee (CMC).
- Establish and maintain a close and effective working relationship with the CMC.

Charities Management Committee

The Charities Management Committee consists of a Trustee appointed from time to time by the Trustees, The Grand Almoner for the time being (ex officio) and up to four suitably qualified persons appointed by the Trustees who may be replaced and re-appointed from time to time as the Trustees consider fit. Their role is to:

- Prepare the annual budget and submit draft for approval by the Trustees.
- Make regular reports to the Trustees.
- Ensure compliance with all the applicable regulatory provisions relating to every charitable fund administered by the Grand Lodge Trustees.

Grand Almoner (GAlm)

- Executive Officer – Strategic role with working relationships with the Trustees, Executive Director, Divisional Grand Almoners, and the Charity Administrator;
- As a member of the CMC, the Grand Almoner provides high level advice on charitable and benevolence matters, with a focus on operational leadership and management;
- Provides advice and support to the Charity Administrator (CA) and day-to-day benevolence support directly to the National Office, Divisions, Regions and Lodges;

Divisional Grand Almoner (DivGAlm)

- Operational role - Member of the Divisional team with a reporting relationship with the Divisional Grand Master whilst retaining and maintaining a direct liaison and reporting relationship with the GAlm
- Administrative relationship, working directly with the Charity Administrator in National Office. Administrative relationship with all funding partners at a Divisional level
- Supervises and provides oversight of the activities of the Region Charity Officers (RCO's)
- Ensures grants and projects conform to the prescribed criteria and strategy
- Has delegated authority up to $1,000 for Critical Need Grant applications*
- Has delegated authority up to $10,000 for Assistance Grants*
- Has delegated authority up to $10,000 for Lodge/Region and Divisional projects*
- Has delegated authority for approval of a 1:1 subsidy (Lodge Projects) or up to 2:1 subsidy (Region Projects) though may make recommendation to the GAlm for a larger subsidy, if deemed appropriate*
- Receives requests for assistance from the GAlm and National Office that apply to his Division and either actions these himself, or delegates to the relevant RCO
- Responsible for training of RCO's, LCO's and LAlm's
- Responsible for promoting TFC within the Division

Region Charity Officer

- Operational role - Works directly with the Divisional Grand Almoner
- Member of the Region team with a direct reporting relationship with the Grand Superintendent of his Region.
- Receives applications for grants/subsidies from Lodges or individuals and assesses if the application meets the prescribed criteria
- Completes documentation to the required standard and forwards to the DivGAlm for approval and processing
- Finalises process by obtaining proof of receipt of payment/vouchers by recipient
- Provides direct support to Lodge Almoners and Lodge Charity Officers
- Responsible for promoting the work of TFC in the Region
- Receives requests for assistance from the DivGAlm that apply to his Region and either actions them or delegates to the relevant Lodge.
- Almoner support

Lodge Charity Officer

- Operational role - Works directly with the Lodge Almoner and Region Charity Officer
- Unofficial Lodge Officer who is responsible to the Master of the Lodge
- Promotes the work of TFC within the Lodge
- Develops and manages charitable projects and applications for assistance within the Lodge

* Applications over this level require CMC or GAlm approval.

References

- *The Charities Act 2005*
- *The Charities Services Web Site*
- *The Freemasons Charity Constitution*

Application Types and Processes

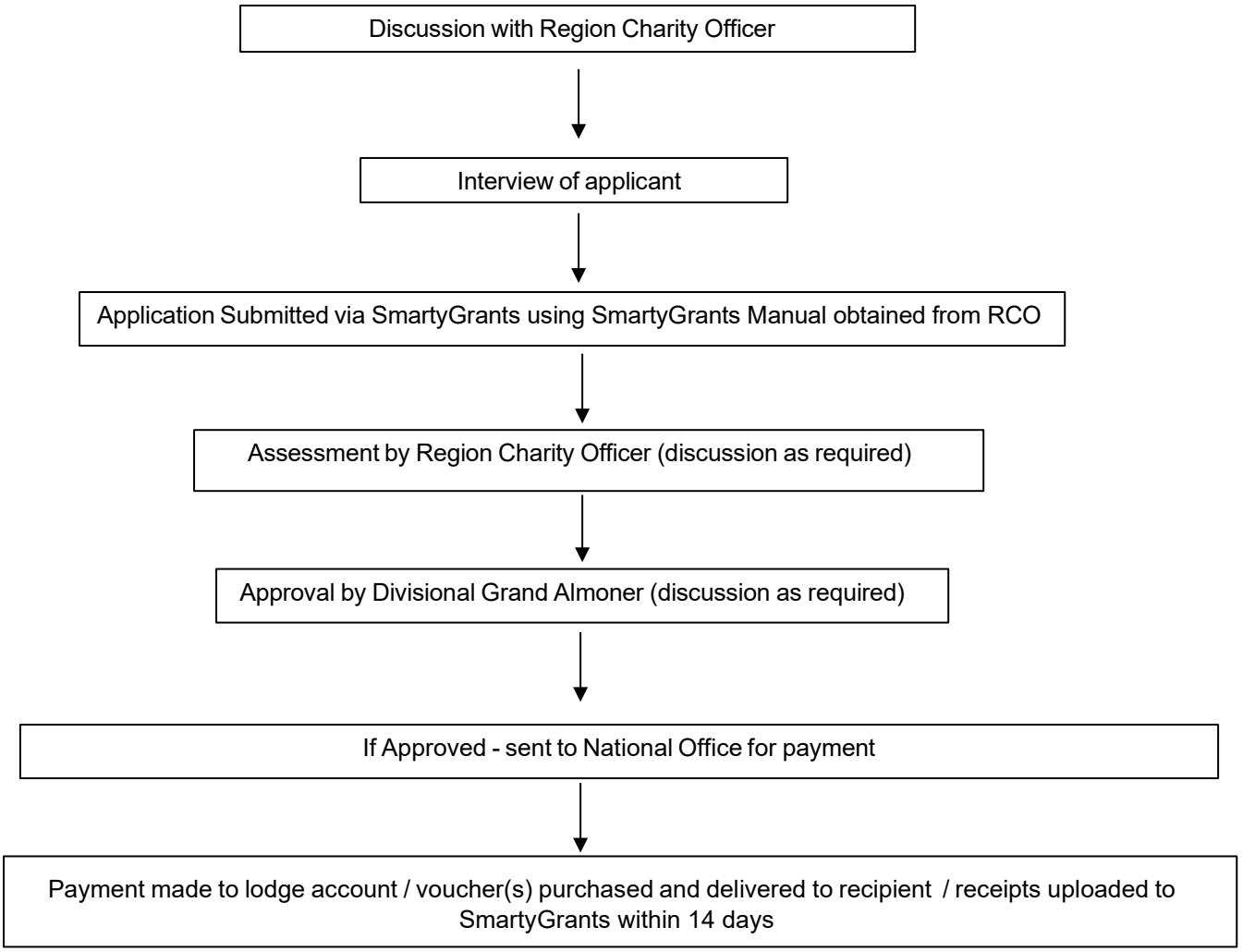
There are four types of applications that can be made to TFC.

1. Critical Need Grants (Relief of Need)

Eligibility:	Individuals in urgent need of assistance (can be either Freemasons or non-Freemasons).
Application Timeframe:	Payment to Lodge a maximum of 3 working days from receipt of fully completed and approved application
Funding:	Up to $1000

Confidentiality is of utmost importance for these applications

These applications are for individuals who are in need of urgent and immediate assistance. The application if approved will be distributed to the applicant in the form of fuel and/or grocery vouchers. It is acknowledged that cash will often need to be used to purchase these vouchers. This is in order, as long as receipts are obtained and uploaded to SmartyGrants. Cash is never to be given to the recipient.

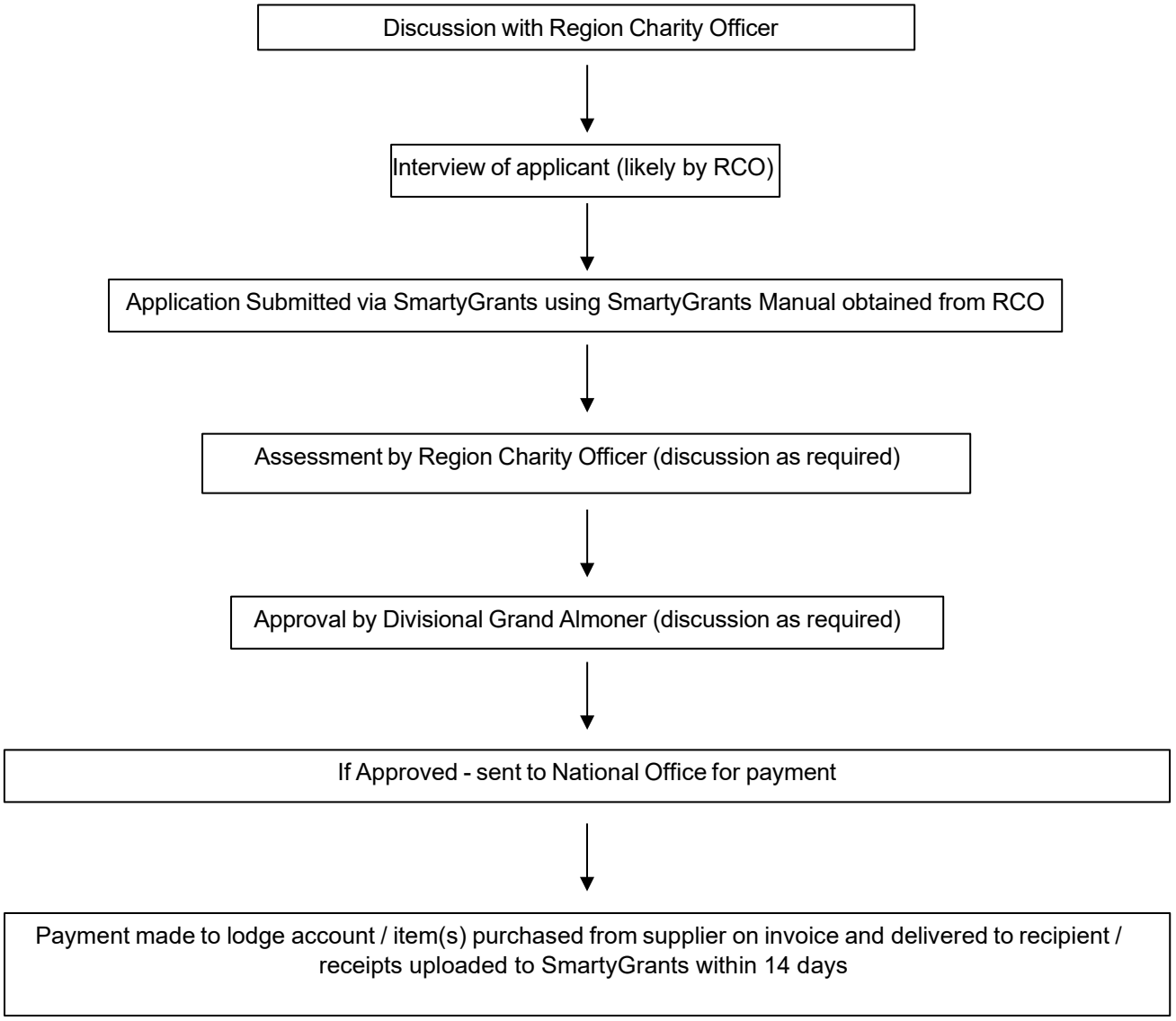


2. Assistance Grants (Relief of Need)

Eligibility:	Individuals in need (can be either Freemasons or non-Freemasons).
Application Timeframe:	Payment to Lodge a maximum of 5 working days from receipt of fully completed and approved application
Funding:	Up to $10,000

Confidentiality is of utmost importance for these applications

These applications are for individuals who are in need of assistance over the longer term and to a greater extent that can be covered by a Critical Need Grant Application. The applications are usually for a specific item or items. This is normally completed by the Region Charity Officer or their nominee. Payment is made direct to supplier on invoice – not via the recipient.

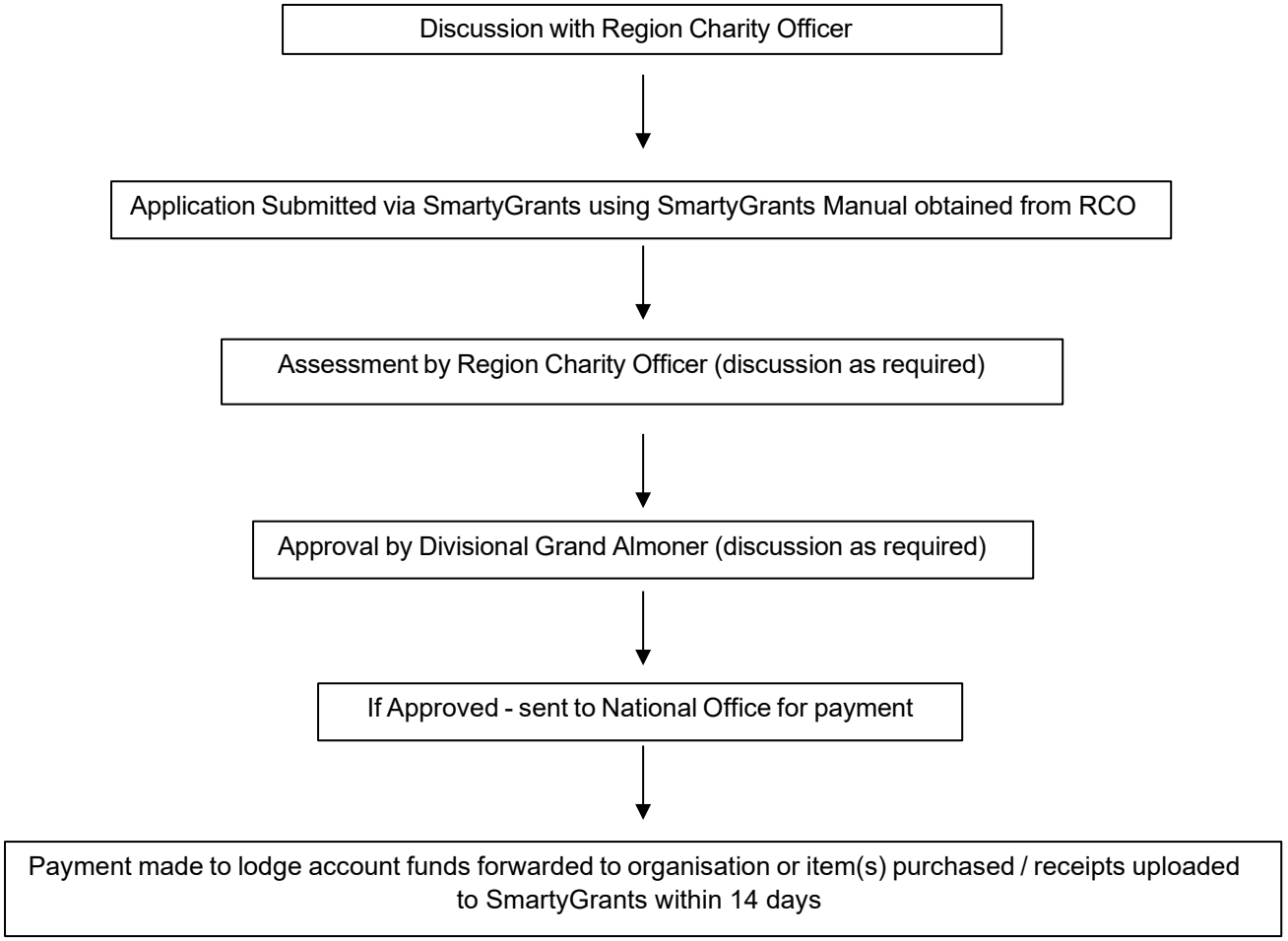


3. Lodge Projects

Eligibility:	Organisations fulfilling the application criteria and outcomes-based objectives of TFC. One Lodge involved in the project.
Application Timeframe:	Payment to Lodge a maximum of 5 working days from receipt of fully completed and approved application
Funding:	Up to $10,000 (Divisional Grand Almoner Approval) Over $10,000 (CMC Approval) Maximum of $15,000 (excluding subsidy)

These applications are for a single Lodge engaged in a charitable project.

TFC wants Lodges to form ongoing relationships with organisations they are partnering with and to consider what additional assistance apart from monetary that can be provided.



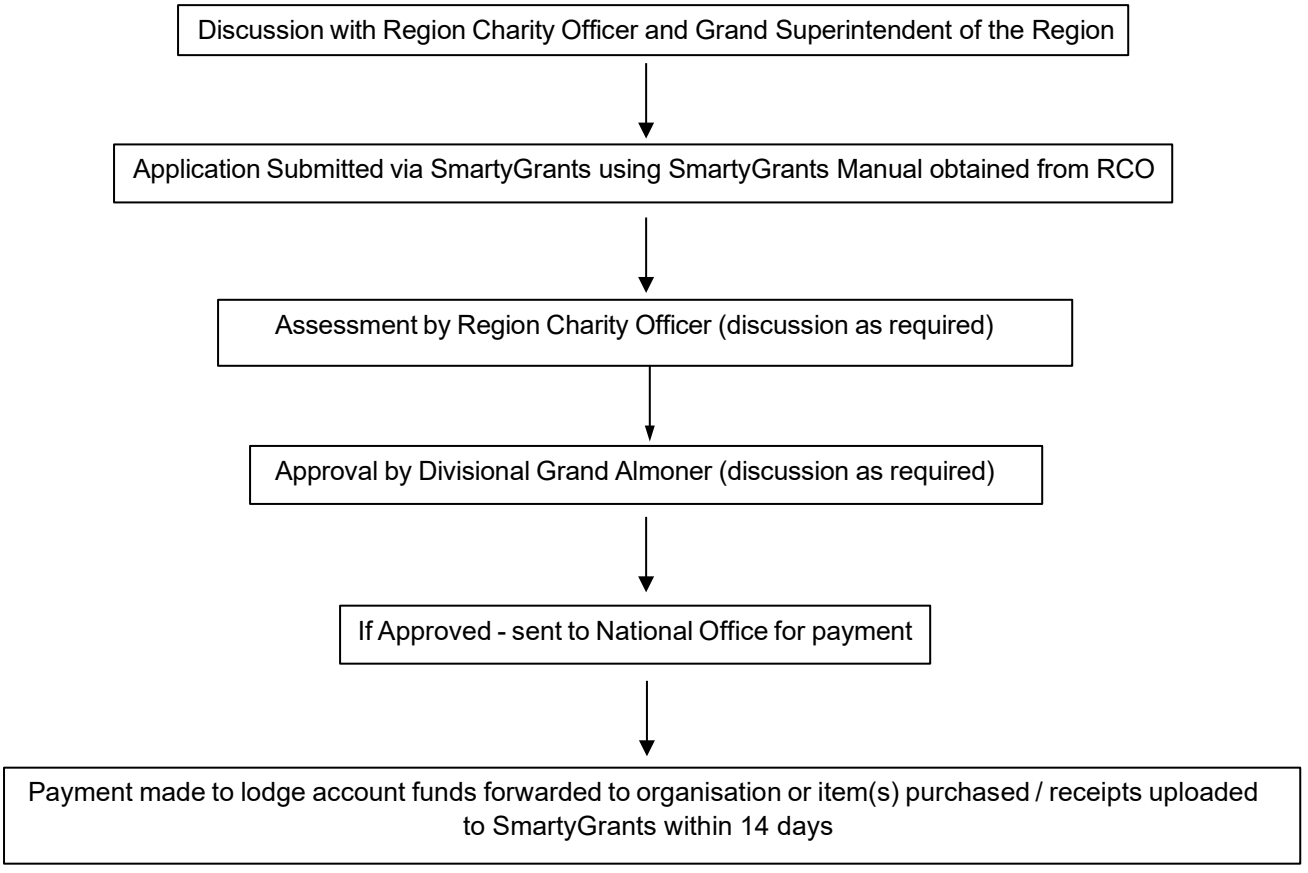
4. Region or Divisional Projects

Eligibility:	Organisations fulfilling the application criteria and outcomes-based objectives of TFC. Two or more Lodges involved in the project.
Application Timeframe:	Payment to the Lodge submitting the application on behalf of the Region or Division a maximum of 5 working days from receipt of fully completed and approved application
Funding:	Up to $10,000 (Divisional Grand Almoner Approval) Over $10,000 (CMC Approval)

These applications are for two or more Lodges engaged in a charitable project.

If more than one Lodge is involved in the project the project may attract higher than 1:1 levels of subsidy dependent on the circumstances. These projects must be co-ordinated through the appropriate Grand Superintendent of the Region. There must be suitably proportional representation from two or more lodges for Region projects. For example, one lodge providing $2000 and another $100 would be unlikely to qualify for a 2:1 subsidy as a Region Project.

If more than one Region is involved in a project, this must be co-ordinated through the Divisional Grand Master. Similar requirements about proportions of donations to the above would apply.



Making Applications to the Charity

Applications to the Charity can only be made with the support of the Lodge – or in the case of Critical Need Grants the involvement and approval of the Lodge Master and Secretary. Applications cannot be made by individual members without this support.

Completing the Application Forms

Applications to TFC are completed using the SmartyGrants system. Instructions on using the system are available from your Region Charity Officer – with whom you should have an early conversation if you are considering an application to the Charity.

Remember to attach supporting information such as:

- Quotes for any items being requested in the application (see the GST FAQ's)
- Information about the recipient organisation or individual to supplement the information on the form.

Remember to work with the charity to include information on exactly what will be purchased with the funds supplied. This includes supplying and attaching quotes (see the FAQ's below to determine if the quotes should be inclusive or exclusive of GST). We do not donate into a "project pool" as such and it is important that TFC funding is targeted to areas that we assist with rather than areas we don't (for example buildings and administration/wages). This is why the early conversation with your Region Charity Officer is important.

When completing the project description and expected benefits, outline the outcomes you are expecting to achieve with the project for individuals and/or the community.

Please do not put references to web sites on the application rather than filling in information requested on the form. It is important that all sections on the form are completed so that the application can be properly assessed.

What Happens After Your Application is Completed?

The Region Charity Officer will assess your application and may want to ask you some questions regarding it. After this your application will be forwarded to the Divisional Grand Almoner for review and, if appropriate, final approval. If approved, the National Office team will arrange payment to the nominated Lodge account noted in your application. You will be advised of this by a confirmation email from National Office if your project is approved.

For Lodge/Region Projects: the funds should be forwarded to the recipient organisation and the receipts obtained and uploaded into SmartyGrants by the applicant within 14 days. The person who filled out the application in SmartyGrants or the Region Charity Officer must upload the receipts.

For Critical Need Grants: the funds should be used to purchase the fuel and/or food vouchers and the receipts uploaded by the applicant to SmartyGrants within 14 days.

For Assistance Grants: the funds should be used to purchase the item(s) on the application invoice and the receipts uploaded into SmartyGrants by the applicant within 14 days.

Application FAQ's

What should I do before making an application?

When making an application, the first step should be to contact your Region Charity Officer to have a conversation about your project. They will be able to give you valuable guidance on what is supported by TFC and a manual on how to fill in the application form(s). Region Projects should also be discussed and agreed to by the Grand Superintendent of your Region.

Where can I find the application forms?

Application forms for all grants are submitted through the Freemasons Charity SmartyGrants portal. All links for applications by Division are contained in the SmartyGrants Manual available from your Region Charity Officer (this should be your first point of contact). They are also available from the Charity Administrator at charityadmin@freemasonsnz.org or Divisional Grand Almoner.

How can I find out who my Region Charity Officer is?

The names of Region Charity Officers are listed on the Freemasons NZ Web Site in the members area and in the Masonica App.

What sorts of questions should I be thinking about before submitting a Critical Need or Assistance Grant application?

Is government or family support available and being obtained? What assistance (other than financial) can the Lodge provide?

Are there any funding areas that The Freemasons Charity do not support?

There are some things that the Freemasons Charity will not currently support:

Activities Outside NZ	Private School Fees	Commercial Business Costs
Buildings	Printed Consumables	Computer Software
Administration and Staffing Costs		Credit Card or Hire Purchase Debt

Cash is never paid out under any circumstances

Are there caps applied to some types of applications?

There may be caps applied to some applications such as motor vehicles and funeral costs. Each case is evaluated on its merits. Need must be established.

Should I obtain a quote and attach it to my application in SmartyGrants?

Absolutely. It is important that quotes are obtained and submitted along with these applications.

Should quotes and figures attached to applications be GST inclusive or exclusive?

Quotes should be obtained *exclusive* of GST when the recipient organisation is purchasing the items and is registered for GST.

Example: A soup kitchen is being supported and is purchasing the equipment. They are registered for GST and can claim the GST portion of the purchase back in their next GST return.

Quotes should be obtained *inclusive* of GST when the entity purchasing the items is not registered for GST.

Example: A Lodge is purchasing equipment to donate to an organisation for a lodge project. The Lodge is not registered for GST. Quotes should be obtained inclusive of GST.

Does The Freemasons Charity still support defibrillators?

Yes, but only specific models of defibrillators are supported. There is a process in place for quoting and purchase of these defibrillators using a special deal negotiated for Freemasons NZ. Details can be obtained from the charity administrator charityadmin@freemasonsnz.org

Application Check List – Lodge/Region Project

- Region Charity Officer contacted to discuss application ☐
- Region Project discussed with Grand Superintendent of Region ☐
- Quotes Obtained (see GST notes for instructions) ☐
- SmartyGrants Application Guidelines acquired from the Region Charity Officer ☐
- Application Completed (supporting documents and quote(s) attached) ☐
- If approved, payment received into nominated Lodge account ☐
- Arrange a presentation with the organisation(s). Take photos of that and the organisation in action if possible. Send these to charityadmin@freemasonsnz.org for publication ☐
- Publicity aspects have been followed through and completed ☐
- Payment (or vouchers) forwarded to recipient organisation ☐
- Receipts obtained and uploaded into SmartyGrants by the applicant within 14 days of payment ☐