

## Grand Lodge of Ohio Charitable Foundation –Assistance Checklist

### Step 1: To be Complete by the Lodge

**Lodge Instructions:** Requests for charitable assistance must begin with the lodge. Please complete the following checklist, answering each question clearly. Answers should be complete, but simple and direct. Include any written documentation (for example: letters asking for help, report to the lodge by brothers investigating the request, etc.) with your request. In recommending an amount, know that typical Foundation assistance ranges from \$500 to \$1,500. Forward this information to the District Deputy Grand Master for his review and verification. Scanned emails, faxed copies, or paper copies are acceptable. The Deputy is responsible for sending the request to the GLO Charitable Foundation.

- 1. Date of Application to the Charitable Foundation**
- 2. Lodge making the request (Name and Number)**
- 3. Name of the Brother in Need or Recipient if not a member**
  - *Include GLO Member Number if the request is for a member*
  - *Relationship of person to lodge if not a member*
- 4. When was the lodge contacted for help?**
  - *(Typically, the date the lodge or a member of the lodge received a request for help or a brother brought the information to the lodge)*
  - *Who contacted the lodge? (name & relationship: lodge brother, wife, clergy, etc.)*
- 5. What kind of help was requested? (Attach a copy of request if written)**
- 6. How did the lodge verify need?**
  - *There is an expectation that the lodge will investigate the request in a respectful way to ascertain the validity and extent of need.*
- 7. What has the lodge done to assist the Brother?**
  - *Include both monetary, non-monetary help, date of lodge action, fund raisers, other sources of charity sought, etc.*
- 8. How much does the lodge request from the Charitable Foundation of the GLO? (dollar amount)**
  - *Often the amount of need changes from the time the lodge learns of a brother in need until a request is made to the Grand Lodge Charitable Foundation. Typically, donations have been made from the lodge, the district, from individual brethren, and it is important that the lodge make a recommendation for the Foundation to consider that takes into consideration charity already received.*
- 9. What would Foundation money be used for? (specific need / purpose)**
  - *It is important to tell the Foundation what the charitable funds will be used for: for example, food, rent, prescription co-pays, a lift chair, utility bill, etc.*
- 10. Lodge Affirmation:** When the lodge completes an application for charitable assistance, answering the above questions, and providing any available documentation to the District Deputy, the application should be signed by the Master, Warden, or Secretary to confirm that this is a request of the Lodge and that the need is real and worthy of Masonic Charity.

## **Grand Lodge of Ohio Charitable Foundation –Assistance Checklist**

### **Step 2: To be completed by the District Deputy Grand Master**

1. Verify that the application is complete using the above points as a guide. An incomplete application will be returned for more information or not be funded.
2. Satisfy yourself that the need is worth our support. If you have questions, take them to the lodge for answers.
3. Make your Written Recommendation. The Charitable Foundation will be acting upon your recommendation. Thus, you must prepare a written statement to the Foundation that you agree or disagree with the request. If you do not agree, state why. If you think the amount should be different, state the amount you think should be given.
4. Recognize that it is your responsibility to recommend, not to approve or disapprove. Thus, all requests should ultimately be sent to the Foundation for action.
5. Call the Foundation president if you have questions.

### **Step 3: Completed Recommendation to the Foundation President.**