

THE GRAND LODGE OF MARK MASTER MASONS

of England & Wales and its Districts and Lodges Overseas



Registered Charity No. 207610

Almoner's Handbook

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Dear Brother Almoner

The role of Almoner is central to the Mark Benevolent Fund (M.B.F.) being able to discharge its responsibilities to its members and their dependants in times of need.

The role can be difficult and challenging at times which is why we have developed this handbook to provide you with the guidance, support material and signposting necessary to enable you to carry out your responsibilities confidently and well.

Above all, a good Almoner must possess the ability to listen and empathise with a Petitioner. Dedicating sufficient time to properly consider the needs of the individual is important too and never act without first agreeing with them what the next steps might be.

Charity is at the heart of our craft and we should be proud of the M.B.F. and the work that it does on behalf of all Mark Master Masons, thanks to their continuing generosity.

I wish you every success in your role as Almoner and thank you for making this significant commitment to our members and the M.B.F.

Yours faithfully and fraternally.

R.W.Bro. Dr John LW Wright, *RD*, P.G.S.W.
President



MARK BENEVOLENT FUND

The M.B.F. is a Registered Charity (207610). It came into existence in 1868 on the suggestion of the then Grand Master, M.W.Bro. Reverend George Raymond Portal, whose views on charity were far more progressive and radical than the general thinking of the day. He was greatly influenced by his passionate embrace of charity, that fundamental virtue to which his attention had been directed in the Craft Initiation Ceremony. His motto was "He who gives promptly, gives twice", and this became the guiding principle of the Fund and remains so to this day.

The M.B.F. administers to Mark Master Masons and their dependants in need by means of grants made in accordance with the Constitutions and Regulations of the Order which can be found at the back annual Yearbook.

The process usually begins with the Lodge Almoner and Visiting Brethren who are in direct contact with Petitioners. They are responsible for putting together a request for assistance which is then routed via the Provincial Grand Secretary to the Charities Manager at Mark Masons' Hall and then, ultimately to the Petitions Committee of the M.B.F.

The M.B.F. has always taken pride in the fact that the process for establishing need and granting relief is straightforward and not rulebound or inflexible. Where need is established, the Petitions Committee will act quickly to provide support.

In all cases grants are paid directly to the Petitioner under advice to the Province.

THE ROLE OF THE LODGE ALMONER

Role and responsibilities

The role of the Almoner is to be the “eyes and ears” of the Lodge, ensuring the welfare of its members, their widows and dependants.

Specific responsibilities include:

Keeping in touch

- Maintaining regular contact with sick or distressed Lodge members.
- Contact members who stop attending lodge meetings.
- Keeping in contact with members who have resigned from the Mark or RAM. Maintaining regular contact with Lodge widows.
- Contacting the families of recently deceased brethren.
- Being alert to the needs and problems of Lodge members and their dependants.

Keeping informed

- Being aware of the aims and activities of the MBF.
- Being aware of the Craft charities and the support they offer.
- Having a basic knowledge of the range of support available from the state and from non-Masonic charities (e.g. armed services charities and other employment-based charities) and how potential applicants can obtain specific advice.
- Attending training and other events to keep up to date with developments affecting his responsibilities or the Masonic Charities.

Providing support

- Making new members welcome, in conjunction with the Proposer and Secunder.
- Ensuring that members, partners and dependants are aware of what support may be available, particularly Masonic support.
- Conducting visits and discussions with members who may need support.
- Assisting the Provincial Grand Almoner when required, e.g. with a request for visiting a
- Brother, widow or dependant from another Province.

Record keeping and reporting

- Maintaining accurate records of all receipts and payments made.
- Maintaining records of all visits to Petitioners.
- Maintaining a record of the names and contact details of subscribing Brethren, widows and dependants, as well as the details of the dependants of resigned or excluded Brethren.
- Reporting on the above to the members at each Lodge meeting, whilst observing data protection requirements always. See page 19 onwards.

In addition, a good Almoner will also make himself aware of happier events such as birthdays, births and special wedding anniversaries so that the Lodge can send appropriate greetings.

To perform this role the Almoner will need to possess considerable tact, courtesy, discretion, patience and humour, together with a sympathetic disposition, a commitment to helping people, and the ability to devote the necessary time and energy to Lodge members and their dependants when necessary. Poverty is not an easy thing to admit to. Health worries are often kept hidden. It can be painful to admit to others what may seem to be a failing and an inability to cope. Confidentiality and a caring approach can be the key to relieving those worries. The office is one that benefits from continuity and it is suggested that a term of five years in the role is generally appropriate.

Identifying cases of need

Awareness

The Almoner should be constantly looking out for cases of need or difficulty among Lodge members or their dependants. In many cases he may be approached directly by a member of the Lodge; other cases may be brought to his notice by a Masonic friend of the brother or dependant concerned.

Frequent absences from meetings can be an indication that something is wrong and that a Brother needs help, so it is important to follow these up perhaps with a phone call or email to check if everything is ok. Alternatively, it may be necessary or indeed more appropriate to ask a Brother who knows the individual well to enquire about his situation and to offer help.

Possible needs

The range of possible needs which an Almoner should look out for is wide, but most will fall within three main categories:

Financial: This covers all sorts of money worries: inability to meet household expenses; difficulty in paying for home repairs and maintenance; emergency costs, e.g. arising from illness; meeting the costs involved in children's education; dealing with debt and its attendant problems.

Health: Healthcare problems also involve costs, which people may find it hard to meet. Individuals may be suffering from all sorts of conditions which affect their well-being and quality of life, whether physical or mental, including depression and various forms of trauma.

Family: Other needs may relate to family and friends, including the effects of bereavement.

The Almoner should be alert for signs of problems like these and should know what advice and support is available to help deal with them.

Discussions with potential applicants

Once it has been established that a need exists, it will be necessary to arrange a discussion in a place where the person seeking help feels comfortable. This will usually be at his home, but in some cases a different venue may be preferred.

The initial approach obviously requires a good measure of sensitivity, combined with tact and diplomacy; all information obtained must be treated in the strictest confidence. The checklist on the next page may be helpful in preparing for and conducting these discussions.

Often, problems can be resolved easily just by talking about them, but it should be remembered that any course of action must be agreed with the Petitioner beforehand.

Before an approach is made to the M.B.F., **it is important that you make sure the Petitioner is receiving all State benefits to which he is entitled.** If this does not appear to be the case, you may need to assist the Petitioner in making an application to the Department for Work & Pensions or other relevant public bodies. No approach should be made to any public body or agency concerning State benefits, however tentative, without the agreement and written permission of the Brother or dependant concerned.

Wherever possible, they should be encouraged to make the approach themselves. It is also important that you confirm an applicant is eligible for any relief from the MBF before proceeding. The Almoner must never offer advice but advise on where the relevant assistance may be obtained.

All Mark Master Masons are Craft Freemasons making them eligible to apply to the Masonic Charitable Foundation (M.C.F.) for help. It is important that all Petitioners approach the M.C.F. for support at the same time as making an application to the M.B.F.

The two charities offer different services and solutions to problems which can be of great benefit to a Brother in need or his dependants. Sometimes we may need to wait for a decision from the M.C.F. before a decision is made on support from the M.B.F. but, where such a delay is necessary, the M.B.F. Petitions Committee may decide to make an emergency payment whilst a result is sought depending on the nature of the problem.

Checklist – Discussions with Potential Applicants

Before the Meeting

- Agree a firm date, time and place convenient to all parties.
- Agree who will attend the discussion.
- Ask the potential applicant if they have a relative or friend they would like to be present.
- Leave a contact number in case arrangements need to be changed, and ensure you have relevant contact details for the potential applicant where possible.
- Let the potential applicant know what information you may need from them during the discussion.
- Obtain as much background information as possible beforehand.
- Ask them to prepare any necessary paperwork or forms that may be needed such as mortgage, loan and bank statements. Letter confirming housing benefit, pension or other government benefits.

During the Meeting

- Arrive on time.
- Show a suitable form of identification if the potential applicant doesn't know you.
- Start the discussion with general pleasantries to create the right atmosphere. Emphasise that the information provided will be **confidential** to you and the MBF.
- Go through the questions you wish to ask in a logical and sensitive manner.
- Obtain evidence as needed or available to verify answers (e.g. Awards of Benefits / Notices of Assessment from the Department for Work and Pensions; bank statements; electricity and gas bills; Council Tax, rent, mortgage and water rate demands). Explain why you need this information.
- Be observant: look out for signs of financial or other distress (e.g. worn furniture or carpets, cold rooms, tired decor, drawn features, poor mobility). In the case of older brethren or their dependants, establish if they have family and what they are doing, or are prepared to do, to help.

Before leaving

- Go through what you intend to do to help, and check that the potential applicant is happy with this.
- Confirm any actions they need to take themselves.
- Tell them what will happen next, and when you will be in contact again.
- Reaffirm your contact details, in case they may wish to contact you.

After the Meeting

- Keep a record of the discussion and of the main points agreed and actions planned.
- When the M.B.F. Petition Form is completed, send it to your Provincial Grand Almoner with the supporting documentation., **DO NOT SEND IT TO MARK GRAND LODGE.**

Keeping records

Good records are essential, covering not only Lodge members but also widows and dependants.

Such records should include:

- Details of all Brethren, including those who have resigned or have been excluded, giving name, address, age, telephone and e-mail address (where available).
- As much other information as possible should be included that could be helpful in the future.
- Names, addresses and telephone numbers of all Lodge widows or other Lodge dependants – again, with as much extra information as possible.
- Details of brethren or dependants who are living in residential or nursing homes.
- The dates and details of all visits to widows, sick brethren and non-attendees.
- Financial records are essential, and care must be taken to ensure that all payments and receipts are carefully recorded together with any supporting vouchers.
- Care should also be taken in keeping full records of payments to applicants when grants have been paid to the Lodge from one of the Masonic charities. Although the details will remain confidential between the Almoner, the petitioner and the charity, the Almoner is responsible to his Lodge for the control and recording of the funds.

SUPPORT AVAILABLE: STATE BENEFITS

Most of all, the Almoner needs to be aware of the range of support available from the Mark and Craft Charities, and when and how it can be called upon. But the M.B.F. can only help in situations where state benefits are not available. As Almoner you will need to have some knowledge of the range of state assistance and where to find advice on obtaining it, in order to be sure that this route has been exhausted before an application is made.

Considerations for Almoners

Due to the continual changes being made to state benefits, advice should always be sought from bodies such as Jobcentre Plus, the Post Office or the local Citizens Advice Bureau.

www.gov.uk is an excellent source of information on all government services and will either give you the information you need or point you to the right place to find it.

Social security and social services

Many people are confused by the terms “social security” and “social services”. Put simply social security means cash benefits and social services is the local government provider of a range of services. Social security is usually claimed by post, initially through the local Department for Work and Pensions office or Pension Service by telephone. Claims for Housing Benefit and Council Tax Benefit are made by post through the District Council. Applications for help from social services should be made by letter or at the relevant Area Office of your county social services department or local authority.

Universal Credit (UC)

UC is a means-tested benefit for people of working-age. The structure of UC is intended to be simpler than the current system of benefits and Tax Credits (as detailed above as it is not specifically an ‘in work’ or ‘out of work’ benefit. It is one credit for people whatever their employment status. Because of this, it should ease the transition into and out of work as people won’t need to transfer to a different benefit as their situation changes. This system is gradually being phased in to replace the aforementioned benefits.

OTHER MASONIC CHARITIES ADMINISTERED FROM MARK MASONS' HALL



M.B.F. WORTHY CAUSES COMMITTEE

The Worthy Causes Committee meets up to 4 times a year at Mark Masons' Hall to examine applications received from Registered Charities looking for financial support or from Mark Provinces / Districts wishing to support suitable Causes.

Major grants are made by this Committee to a wide range of qualified causes such as the R.N.L.I. and Shelter Boxes for the Haitian earthquake. The Worthy Causes Committee donates funds from the Mark Benevolent Fund. The Fund does not support research projects or disburse funds for staffing costs, amongst other restrictions and its scope is rigorously adhered to.



ORDER OF THE SECRET MONITOR BENEVOLENT FUND

The OSMBF considers Petitions from individual members of the Order of the Secret Monitor for personal financial support and assists recognised Charities with "Worthy Causes" grants. The applications for charitable grants to "Worthy Causes" are generally made through the Province in the form of match funding

Applications for assistance should be made to the Provincial Grand Almoner of the Order of the Secret Monitor.



Masonic

Charitable Foundation

How do we help?

A wide range of help and support is available for financial, health and family related needs, including:

♥ Financial

- Essential daily living costs
- Grants following an accident, redundancy or personal crisis
- Funeral bills
- Minor home repairs

♥ Health

- Medical treatment
- Dental treatment
- Mobility aids and essential home adaptations
- Respite care
- Counselling

♥ Family – Children in full-time education

- Essential costs for education or training
- Scholarships, travel grants and student accommodation
- Supporting exceptional talent in sport, music or the performing arts

♥ Family – Older people

- Masonic care homes – including nursing, residential, respite and dementia care
- UK holidays

♥ Practical assistance

Our Advice & Support Team offers confidential, impartial and practical guidance about the help we can provide. The Team can also help with applications for state and local authority benefits, and can put you in touch with other organisations who can give advice on care, employment and education.

Who is eligible?

Those seeking support must demonstrate the following:

♥ A Masonic connection

Those seeking support must be a Freemason or have a strong family connection to a Freemason under the United Grand Lodge of England. The Freemason does not necessarily need to be a subscribing member, but he must have been before the need arose.

♥ A financial, health or family need

A financial or family need often follows a decrease in household income, but it may also arise because of a life-changing event such as a medical diagnosis, changing care needs, family breakdown or the death of a family member.

Can we help you?

If you would like to speak to someone about the range of support available to Freemasons and their families, please speak to your Lodge Almoner or call our dedicated freephone enquiry line:

0800 035 60 90

Enquiries can also be sent to **help@mcf.org.uk** or

Masonic Charitable Foundation
60 Great Queen Street,
London WC2B 5AZ

OTHER SUPPORT AVAILABLE

In addition to state benefits and help available from the Masonic Charities, Masons and their dependants may be eligible for support from other charities. These include armed services charities, benevolent charities working on behalf of other occupational groups and charities supporting people with specific conditions or disabilities, as well as organisations offering more generic assistance to people in need or poverty.

This section provides information on selected charities that are likely to be of greatest relevance to Almoners. Several other organisations are listed in the next section, along with their contact details. The Turn2us website (www.turn2us.org.uk), run by Elizabeth Finn Care, is a valuable resource to find out what help may be available, covering both state benefits and grants from other organisations.

Armed Services charities

Masonic Charity beneficiaries may also be eligible for support from the armed service charities. Only a few of these are described below, but there is a single, integrated application process for all of them, making it relatively simple and straightforward to apply for grants. Please check their websites for full details on how to apply.

The question all Lodge and Case Almoners should ask when assistance is required is 'Are you or were you (or was your husband, in the case of a widow) a member of the armed forces?' If the answer is 'yes', then support from the armed forces charities should be available.

The Royal British Legion

Support is available to serving and former members of the armed forces, their widows and dependants.

Care available includes:

- Individual grants, e.g. for immediate financial needs, mobility equipment or home equipment, including brown and white goods.
- Home improvement loans. Business grants.
- Remembrance travel.
- Care homes, holidays and respite care: three homes have dementia support units.

Soldiers, Sailors, Airmen and Families Association (SSAFA) Forces Help

SSAFA Forces Help helps and supports those who serve or have served in the Armed Forces – even if it was only for a single day (for one year in the Reserve Forces if this was non-operational). It also supports dependants, i.e. anybody, regardless of age, who is clearly dependent on the eligible person.

ABF The Soldiers' Charity (*formerly the Army Benevolent Fund*)

The Soldiers' Charity provides support to soldiers, former soldiers and their families in time of need. The Charity works in partnership with Regimental and Corps Benevolent Funds and in cooperation with the other Service Charities.

Support is given both to individuals and charities. Individual needs can range from an electric wheelchair or stair-lift for an injured former soldier to care home fees for a Second World War veteran or a much-needed holiday for a war widow and her young children.

As with all armed forces charities the initial contact is the local branch of SSAFA Forces Help or the County Field Officer of the Royal British Legion.

OTHER AGENCIES AND CHARITIES

Age UK - is a new organisation combining Age Concern and Help the Aged. It provides a range of products and services to help people enjoy a better later life, as well as acting as a powerful voice of age in the UK.

Alzheimer's Society - is a membership organisation which works to improve the quality of life of people affected by dementia in England, Wales and Northern Ireland.

Barchester Healthcare Foundation - makes grants to older people and other adults (18+) with a physical or mental disability whose health and/or social care needs cannot be met by the statutory public sector or by the individual.

Benevolent funds

There are numerous benevolent funds offering support for people who have worked in specific fields or professions. An example is the Civil Service Benevolent Fund, for which all current and former civil servants and their families are eligible. Services provided include:

Financial assistance – grants, repayable loans and other allowances. Residential and respite care advice.

Citizens Advice Bureau (CAB)

There are currently over 3,000 CAB outlets offering advice to the general public. All volunteers are encouraged to undertake continuing training to keep up with changes in law, legislation and procedures. Advice is available via the Internet at www.adviceguide.org.uk. Advice is also available face-to-face, by telephone or via e-mail. Volunteers handle numerous debt-related enquiries. They will contact creditors and will assist clients to prepare a controllable budget. There is a partnership arrangement with Macmillan to bring state benefits and financial advice to people living with cancer, and an arrangement with the Royal British Legion and RAF Benevolent Fund to provide benefits and debt advice to veterans.

Contact a Family

Contact a Family provides support, advice and information for families with disabled children, no matter what their condition or disability.

Counsel and Care

Counsel and Care's Advice Service provides help and guidance for older people on many different issues, particularly relating to care and support services, either in the community or in residential care. The charity provides personalised, in-depth advice and information and has some invaluable factsheets.

Crossroads Care - is Britain's leading provider of support for carers and the people they care for. It is a national network of local charities providing flexible services to people of all ages and with a range of disabilities and health conditions.

Disabled Living Foundation - is a national charity providing independent advice on mobility aids, disability aids and daily living equipment.

Elizabeth Finn Care - is a charity providing direct financial support to individuals with a professional or similar background who have a low household income and minimal savings.

FirstStop Advice - is a one-stop advice service for older people, their families and carers seeking advice on care, housing and finance. The Advice Line is staffed by trained Advisors in each of the four partner organisations: Counsel and Care, Elderly Accommodation Counsel, Age UK and NHFA.

Friends of the Elderly - provides one-off grants for essential items such as mobility aids, basic furniture, household white goods and appliances, property repairs and adaptations or regular allowances paid monthly or twice a year, to support older people living at home who are on a low income.

Independent Age - provides older people with practical support and financial help, through emergency grants, help with equipment to aid independence and new bedding and clothing for hospital stays.

Law Centres – Not-for-profit legal practices providing free legal advice and representation to disadvantaged people. Where there is no Law Centre in the area, Community Legal Advice can provide details of legal advisers or solicitors.

Macmillan - Macmillan Cancer Support improves the lives of people affected by cancer, by providing practical, medical and financial support and pushing for better cancer care.

MS Society - is the UK's largest charity for people affected by multiple sclerosis (MS). The Society funds MS research, runs respite care centres, provides grants (financial assistance), education and training on MS. It produces numerous publications on MS and runs a Freephone specialist Helpline.

Parkinson's Disease Society - the UK's Parkinson's support and research charity, providing information, research, friendship and support and campaigning.

Princess Royal Trust for Carers - is the largest provider of comprehensive carers support services in the UK. Through its network of independently managed Carers' Centres, young carers services and interactive website, the Trust currently provides quality information, advice and support services to carers.

RABI - the Royal Agricultural Benevolent Institution is a grant-making charity that supports members of the farming community. RABI helps those in need who are currently working full-time in agriculture, or have previously done so for at least ten years and are now retired or have had to give up work due to chronic illness or disability. It can also help dependants of those who are working or have worked in agriculture.

React - Rapid Effective Assistance for Children with potentially Terminal illness is a dynamic charity working to improve the quality of life for financially disadvantaged children with life-limiting illnesses living in the UK.

RNIB – the Royal National Institute of Blind People (RNIB) is the UK's leading charity offering information, support and advice to people with sight loss. Grants are available for essential household equipment, computer equipment and other purposes including debt incurred for essential services.

Turn2Us - operated by Elizabeth Finn Care, Turn2Us helps individuals to gain access to the money available to them in welfare benefits, charitable grants and other financial help. It provides guidance via a website and free confidential helpline.

CHARITY AND AGENCY CONTACT INFORMATION

Age UK	www.ageuk.org.uk
Alzheimer's Society	www.alzheimers.org.uk
Barchester Healthcare Foundation	www.bhcfoundation.org.uk
Citizens Advice Bureau	www.citizensadvice.org.uk
Civil Service Benevolent Fund	www.foryoubyyou.org.uk
Contact a Family	www.contact.org.uk
Counsel & Care	www.careforcarers.org.uk
Crossroads Care	Various regional websites
Government Website	www.gov.uk
Disabled Living Foundation	www.dlf.org.uk
FirstStop Advice	www.firststopcareadvice.org.uk
Friends of the Elderly	www.fote.org.uk
Independent Age	www.independentage.org
Law Centres Community Legal Advice	www.lawcentres.org.uk www.gov.uk
Macmillan Cancer Support	www.macmillan.org.uk
MS (Multiple Sclerosis) Society	www.mssociety.org.uk
Parkinson's Disease Society	www.parkinsons.org.uk
Princess Royal Trust for Carers	www.carers.org
RABI (Royal Agricultural Benevolent Institution)	www.rabi.org.uk
REACT (Rapid Effective Assistance for Children with potentially Terminal illnesses)	www.reactcharity.org
RNIB (Royal National Institute of Blind People)	www.rnib.org.uk
RAF Benevolent Fund	www.rafbf.org
Royal British Legion	www.britishlegion.org.uk
Royal Naval Benevolent Trust	www.rnbt.org.uk
SSAFA Forces Help	www.ssafa.org.uk
Turn2Us	www.turn2us.org.uk

DATA PROTECTION FAQs FOR ALMONERS

Issued by
United Grand Lodge of England, 10 August 2018

This guidance is written for Almoners to assist them to comply with data protection legislation. It is additional to data protection guidance that has already been circulated but is focussed on issues that arise specifically for Almoners. The nature of an Almoner's duties means that sensitive personal data such as healthcare or financial information may be processed. This means that Almoners need to think carefully about data protection and privacy.

I. Obtaining consent

Can I update the Lodge on a Brother's health?

You should never give an update to a Lodge on a Brother's health without the express consent of that Brother. Many Brethren may expect that what they share with the Almoner will be reported to the next Lodge meeting, but this must not be assumed.

Can I update the Lodge on a Brother's wife's health?

See below

How can I obtain consent?

Consent will normally be oral, but could also be in writing or even by gesture.

How specific does the consent need to be?

Consent must be specific about how the details will be used. A consent given by saying "you may share my details with the Lodge" is insufficient. The following examples of consent could be specific enough for your purposes:

"I'm happy for you to report on my health to the Lodge in the usual way"

"Yes, include my health details in your written report"

"Do update any members who ask and let them know I hope to be at the next meeting"

"Please use my financial details to complete the application for charitable relief"

Almoner: "Are you happy for me to provide a spoken update on your health to the Lodge and to pass on anything else you tell me about it today to any members who ask?" Brother: "Yes."

How should I record oral consents?

Oral consent will normally be enough for almoners and it will rarely be appropriate in the circumstances for you to ask for written consent. If you rely on oral consent, then record in your notes for each case:

1. who consented;
2. when they consented;
3. what they consented to; and
4. how they consented.

For example, your notes might read “16/6/18 Brother Smith said “yes” to oral report to Lodge of his health”.

What information do I need to provide to the Brother I am visiting?

If you are seeking oral consent to pass on his details to your Lodge, then a request for consent could be structured as follows:

1. Explain that you are the Lodge Almoner (unless he already knows this);
2. Provide your contact details (unless he already has these);
3. Explain that you won't record or pass on any information without his consent.
4. Ask if he consents to you using the information he has provided to you to give an oral/written report at the next Lodge meeting and/or an update to members who ask after him.
5. Record his response in your notes.
6. Remind him that he can change his mind at any time by letting you know.
7. Explain that if he is ever unhappy about the report then he should let you know.

Arguably, you should also explain that if he is unhappy with your response to any complaint then he has the right to complain to the Information Commissioner's Office (ICO). However, this may not naturally fit into a normal conversation and so see below for exceptions.

Can I provide this information in writing instead?

Yes. You could if you wish provide the information set out in the previous answer on a calling card/ piece of paper. If you already provide contact details by way of a business card then you may wish to set out these details on the back of the card. This would save you from having to give the information orally during a visit.

I'm happy providing this information orally except for the bit about the ICO. Can I provide this in another way?

If your Lodge summons normally contains your contact details as Lodge Almoner, you could arrange for a sentence to be added in small print underneath along the lines of “Please contact the Almoner if you are unhappy with how he uses your data. If he cannot resolve your complaint you have the right to complain to the Information Commissioner's Office at www.ico.org.uk.”. Alternatively, this information could be included in your Lodge's data protection notice or on a calling card (see previous answer).

What if a Brother cannot give his consent?

If the Brother has difficulty understanding your request for consent or is incapable of giving his consent, then you cannot collect a valid consent unless his spouse or carer is prepared to consent on his behalf.

But he is my friend – why can't I gossip about him like I do with all of my friends?

If you receive information *as a friend* and pass it on *as a friend*, then you are free to act as you think appropriate. Data protection laws apply to all information you receive or share in your capacity as Almoner.

Whenever you speak during a Lodge meeting, submit written reports to the Lodge or email all Lodge members you are acting *as Almoner*.

II. Reporting to my Lodge

Should I report orally or in writing to my Lodge?

As long as you have consent for what you do, you can provide an oral or written Almoner's report to Lodge meetings. However, from a data protection perspective it is far preferable that you report orally. It is unlikely that every member of a Lodge will store securely and then destroy effectively a written Almoner's report.

What if we don't have time at meetings for oral Almoner's reports?

If a Lodge has decided to use written Almoner's reports because oral reports are too time consuming or are not of universal interest then consider alternative approaches to make oral reports work. For example, you could report orally very briefly on each case in Lodge, or just list the names of those about whom you have updates, and invite those Brothers who would like more detail to come and speak with you afterwards.

My Lodge would still prefer to use written reports – is this legal?

Yes, a Lodge can circulate a written Almoner's report if it wishes. However, the report must contain a warning that it contains highly sensitive personal data and so must be stored securely and destroyed (or deleted) after use. The Almoner should also take extra care to record the consents of the subjects of his report and ensure that they understand that their data will be published in writing and circulated to all of the Lodge.

How should an oral Almoner's report be minuted?

Lodge minutes of any meeting at which an oral report was given should not include any sensitive healthcare information. For example, a typical report could be recorded in the minutes as "The Almoner gave an oral report".

What about details of a deceased Brother?

Once a Brother has died then data protection legislation no longer applies to his details and instead normal etiquette applies. You are free to make such oral or written announcements as are appropriate to inform your brethren of the death, and the matter can be recorded in the minutes as the Secretary sees fit.

III. Consents from non-Masons

Can I use or store details of widows or other dependants?

If you wish to collect or store details about a widow or other dependants of a deceased Brother then you must obtain the consent of that widow or dependant. If they are a child, the consent of their parent or guardian is required. The consent should be clear about why you are keeping the details e.g. "to provide an update to the Lodge on your circumstances and how we are assisting you" or "to contact you to arrange my quarterly visits to you".

Can I use or store next of kin details?

If a Brother provides next of kin details to you or asks you to include in an Almoner's report details of their wife/partner's health then you should ask the Brother if he has consent from his wife/partner to allow that information to be included in the report, or if you are in contact with the wife/partner you may ask them directly.

IV. Storing personal data

What do I need to do to keep data I hold as Almoner safe?

You must think carefully about how you store personal data that you hold as Almoner. You must take appropriate measures to keep the data safe and secure. If you keep any notes about Brother's health on your computer then the notes should be password protected. If you keep paper notes then avoid taking them anywhere if they are not needed for that journey. For example, if you are going on a visit to a hospital then do not take with you papers relating to other Brothers who are not in that hospital.

I have received a request for deletion – can I contest it?

If any person whose personal data you store in your role as Almoner asks you to delete that data then you must do so immediately. This includes not just requests from Masons but also requests from other people such as next of kin or widows.

My data protection question is not answered here – what should I do?

At first instance please contact Metropolitan Grand Lodge/ your Province/ your District.

These FAQs are intended to help share knowledge and guidance but are not legal advice and are not a substitute for independent legal advice on compliance, if you consider that necessary. Lodges which are not based in the UK will need to consider the impact of any local laws concerning data protection.

**United Grand Lodge of England
10 August 2018**



**Almoner's Handbook
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