GRAND LODGE OF TEXAS
A.F.& A.M.
MAKING GOOD MEN BETTER

CHARITY RECORDS BOOKLET
YEAR _____

Lodge Name_____No.____District_____

Monthly Records Book of Subordinate Lodges
Volunteer, Youth, Charitable, and Community Service Programs

IMPORTANT
Retain files and receipts for Tax-Exemption Purposes

*SUMMARY SHEET IS TO BE REPRODUCED AND USED FOR THE MONTHLY REPORTS TO THE GRAND LODGE.

REVISED BOOKLET IS THE RESULT OF SUGGESTIONS PUT FORTH BY THE MEMBERSHIP. WE HOPE THIS SIMPLIFIED VERSION WILL HELP REDUCE THE RECORD-KEEPING TIME. PUNCH HOLES IN BOOKLET AND PLACE IN A BINDER.

INSTRUCTIONS

Keep this booklet in the Secretary's desk. Immediately after an Activity Committee makes its final report, the required figures should be entered in the appropriate page, category, and columns and verified by the Secretary. Please create a file to maintain receipts pertaining to each entry. The District Deputy will verify that this booklet has been kept up-to-date on the annual Lodge visitation.

GENERAL:

After reviewing the records submitted by participating Lodges and after hearing some of the suggestions of the Members, we have revised the format of the record booklet.

1. Most Lodges work on one project per month as a group. For these Lodge Secretaries a more concise record is needed. Therefore we have made the tables more generic giving the Secretaries the option of using one table for all of their yearly records within the separate sections. Therefore Lodges may list activities such as donations to the Scottish Rite Hospitals and the Home and School on the same table.
2. For those Secretaries who prefer to have separate tables for separate projects or may have a continuing project, which spans over several months there should be ample copies of the tables in the booklet to continue this way and copies may be made and inserted into the booklet.
3. The Monthly Summary is being revised to reflect the changes in the booklet. The list has been simplified to read – Grand Lodge Youth Programs, Other Youth Programs, Other Grand Lodge Programs, Community Service and Recognition Programs, and Veterans Programs. To complete the Summary each month, list the totals of each type of charitable donation and compute the monthly total.

In all the tables, please round the numbers to a whole number.
Do not use fractions, dollar signs, cent signs, decimal points, etc.

Instruction for each column:

Column B – Headcount – Number of people, who bought tickets, attended a benefit, listened to a story, were taken shopping, etc.

Column C – # of Masons – Members who worked, presented a program, volunteered at a school, hospital, etc.

Column D – # of Helpers – Non-Masons, wives, Eastern Star members, etc.

Column E – Mason Hours – Time spent on project.

Column F – Helper Hours – Non-Mason time.

> **PLEASE NOTE – The records should only reflect *hours* and these hours *should not be converted* into an estimated dollar amount for the time spent.**

Column G – Mason Miles – Miles are figured per vehicle used and not the number of Masons riding in the vehicle.

Column H – Helper Miles – Miles are figured per vehicle used and not the number of helpers riding in the vehicle.

Column I – Non-cash Estimated Value – Cost of items donated, cost of gas, cost of rental for items rented and used to benefit charitable organizations or schools, etc.

Column J – Cash donated by Lodge to any program – scholarships, Grand Lodge Library Patrons, Masonic Charities, etc.

GRAND LODGE YOUTH PROGRAMS - INCLUDING GRAND LODGE PROGRAMS (TAKE TIME TO READ, TOGETHER AGAINST DRUGS, DEMOLAY, RAINBOW, ETC. – SCOTTISH RITE AND SHRINE HOSPITALS,ETC.

Name *see note below table.	Head Count of participants (B)	# of Masons (C)	# of Helpers (D)	Mason Hours (E)	Helper Hours (F)	Mason Miles (G)	Helper Miles (H)	Non-Cash Est. Value (I)	-Cash- (J)
JAN									
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ANNUAL TOTALS									

*List the name of Program next to the Month. If this is a continuing activity you may want to dedicate a single table to the project. If more tables are needed for your records you may duplicate pages.

Name *see note below table.	Head Count of participants (B)	# of Masons (C)	# of Helpers (D)	Mason Hours (E)	Helper Hours (F)	Mason Miles (G)	Helper Miles (H)	Non-Cash Est. Value (I)	-Cash- (J)
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ANNUAL TOTALS									

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YOUTH PROGRAMS - COMMUNITY PROGRAMS (BOYS/GIRLS CLUBS, SCOUTS, DRUG FREE PROM/GRADUATION PARTIES, AFTER-SCHOOL PROGRAMS, MENTORING, SPORTS PROGRAMS - I.E. SUMMER BASEBALL & SPECIAL OLYMPICS) AND SCHOLARSHIPS AND AWARDS GIVEN BY LODGE TO YOUNG PEOPLE.

Name *see note below table.	Head Count of participants (B)	# of Masons (C)	# of Helpers (D)	Mason Hours (E)	Helper Hours (F)	Mason Miles (G)	Helper Miles (H)	Non-Cash Est. Value (I)	-Cash- (J)
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GRAND LODGE OTHER PROGRAMS - MASONIC RETIREMENT CENTER, MASONIC GRAND LODGE LIBRARY AND MUSEUM (PATRON, SAM HOUSTON HALL OF FAME, SUPPORTING MEMBERSHIP), GIFT OF LIFE PROGRAM, ETC.

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COMMUNITY SERVICE AND RECOGNITION PROGRAMS - LODGE & MEMBER DONATIONS TO THE COMMUNITY (CASH DONATIONS, USE OF FACILITIES, PURCHASE OR LOAN OF EQUIPMENT, VOLUNTEERING), SENIOR CITIZEN PROGRAMS AND FOOD BASKETS, RECOGNITION OF LAW ENFORCEMENT AND CITIZEN OF THE MONTH OR YEAR, ETC.

Name *see note below table.	Head Count of participants (B)	# of Masons (C)	# of Helpers (D)	Mason Hours (E)	Helper Hours (F)	Mason Miles (G)	Helper Miles (H)	Non-Cash Est. Value (I)	-Cash- (J)
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VETERANS PROGRAMS - INCLUDING SPECIAL RECOGNITION OF VETERANS, VOLUNTEERING AT VETERANS HOSPITALS AND RETIREMENT CENTERS, ETC.

Name *see note below table.	Head Count of participants (B)	# of Masons (C)	# of Helpers (D)	Mason Hours (E)	Helper Hours (F)	Mason Miles (G)	Helper Miles (H)	Non-Cash Est. Value (I)	-Cash- (J)
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Insert a copy of this blank page for pages 3, 5, 7, 9 and 11 if additional pages are needed for any of the programs for which you are collecting records.

LODGE NO._____

GRAND LODGE OF TEXAS, A.F. & A.M.
MONTHLY SUMMARY OF CHARITY RECORDS BOOKLET FOR THE MONTH OF_____

LODGE _____	Head Count of participants (B)	# of Masons (C)	# of Helpers (D)	Mason Hours (E)	Helper Hours (F)	Mason Miles (G)	Helper Miles (H)	Non-Cash Est. Value (I)	-Cash- (J)
GL YOUTH PROGRAMS									
OTHER YOUTH PROGRAMS									
GRAND LODGE OTHER PROGRAMS									
COMMUNITY SERVICE AND RECOGNITION PROGRAMS									
VETERANS PROGRAMS									
OTHER PROGRAMS WHICH DO NOT FIT THE ABOVE									
TOTALS									
GRAND LODGE	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)
REFERENCE ONLY									

PLEASE REPRODUCE THIS SUMMARY SHEET AS NEEDED THROUGHOUT THE YEAR. SEND **ONLY** THE SUMMARY SHEET TO GRAND LODGE EVERY MONTH AND KEEP THE BOOKLET FOR YOUR LODGE RECORDS ALONG WITH ALL RECEIPTS AND OTHER PAPERS TO DOCUMENT YOUR CHARITABLE DONATIONS.

THANK YOU.

PLEASE SIGN AND INCLUDE CONTACT PHONE NUMBER BEFORE MAILING.

NAME_____

PHONE_____

Notes -