

**DISTRICT
DEPUTY
HANDBOOK
AND
REFERENCE
GUIDE**

KNIGHTS OF COLUMBUS
SUPREME COUNCIL HEADQUARTERS
1 COLUMBUS PLAZA
NEW HAVEN, CONNECTICUT 06510-3326
www.kofc.org

**Resolution for Membership Growth
Adopted by the delegates at the
121st Supreme Convention in Washington, D.C.**

WHEREAS, it is the policy of the Knights of Columbus to fulfill Father Michael J. McGivney's vision to extend to each and every eligible Catholic man an invitation to become a member of this great Order; and

WHEREAS, membership in the Order symbolizes an individual's commitment to his faith as a practicing Catholic, his profound love for his country and his steadfast dedication to serving his community; and

WHEREAS, membership growth is crucial to both the vitality of the Order and the Order's ability to carry out the many magnificent activities, programs and services it provides for its members, its Church, and society; and

WHEREAS, the members of this 121st Supreme Council have become determined to dedicate themselves to strengthening and increasing the Order's membership so that others can experience, first hand, the allegiance of fraternalism and the fulfillment from charitable service;

NOW THEREFORE BE IT RESOLVED, that it is the responsibility of each and every Brother Knight to work toward fulfilling Father McGivney's vision by making council and membership growth a leading priority;

FURTHER RESOLVED, that we urge every member to commit himself to bringing in at least one new member each year; and

FURTHER RESOLVED, that the leadership at every level of the Order; the Supreme Officers and Directors, State Deputies, District Deputies and Grand Knights understand and accept their special responsibility to increase the membership of the Order.

ROLE OF THE DISTRICT DEPUTY

The district deputy is the representative of the supreme knight and the state deputy and is responsible for the supervision, growth and expansion, and general care and well-being of the councils assigned to his district. (Section 62, "Charter, Constitution and Laws of the Order"). He is the key to the success of the Order.

His responsibilities include ensuring that his councils follow the Order's laws and rules, promoting effective membership recruitment and retention programs, identifying and developing new council locations, assisting councils in conducting relevant service programs, and monitoring the general financial and social health of the councils in his district.

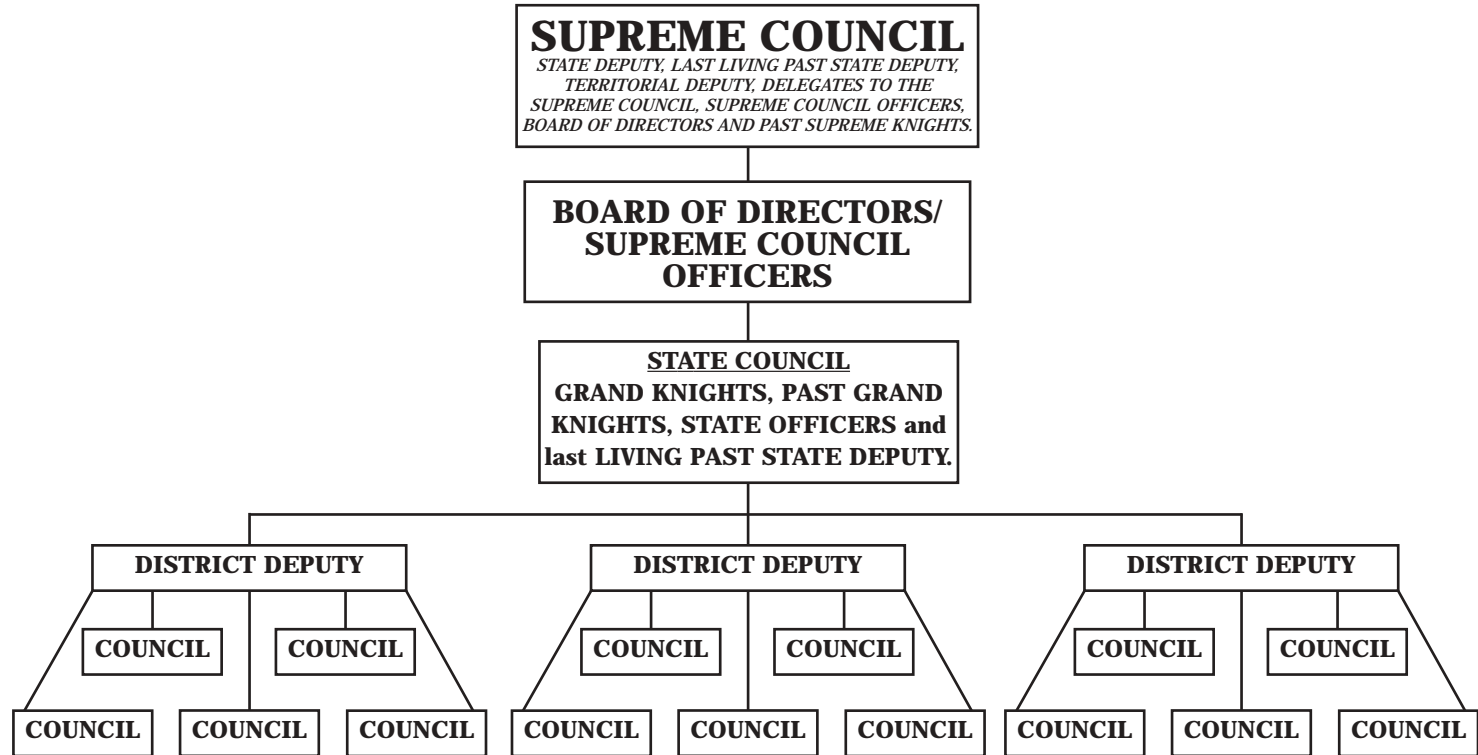
The district deputy, having been nominated by the state deputy, is appointed and approved by the supreme knight, and is directly reportable to the state deputy for all activities within the district and fulfills the very important communication link between the state and Supreme councils and local councils. The district deputy serves at the discretion of the state deputy and his term expires on June 30 of each year.

BENEFITS OF SERVING AS A DISTRICT DEPUTY

The district deputy plays an important role in the Order's continual growth. Along with the ability to contribute to the well-being of the Knights of Columbus, the Church and the community, the position carries many personal opportunities as well, such as:

- Expanding professional relationships with council officers through successful membership and programming activities.
- Identification as a leader in the community.
- Recognition for outstanding achievements through the Star District and New Council Development awards.
- The opportunity for leadership advancement in the Order.

ORGANIZATIONAL CHART



ADMINISTRATIVE RESPONSIBILITIES

The administrative responsibilities of the district deputy include having general control and supervision of the councils within his district and being responsible for the enforcement of the laws and rules of the Order by each council. The following are some of the common duties that a district deputy will be faced with as well as resources that are available to him.

DISTRICT DEPUTY MATERIALS AND RESOURCES

The district deputy's outfit consists of a robe, jewel of office and various ceremonial booklets - Installation of Officers booklet (#770), a First Degree Ceremonial Booklet and Second Degree Ceremonial Booklet. He can obtain these items, except for the district deputy's jewel, from the predecessor of the district to which he is assigned. Replacement costs of ceremonial books are charged to the state council.

JEWELS

The supreme secretary forwards the jewel for each new district deputy to the state deputy for presentation at installation ceremonies. The jewel is sent after the jurisdiction's district deputy appointment plan is approved by the supreme knight. The retiring district deputy is allowed to retain his jewel as a memento of his term in office.

ROBES

If the retiring district deputy's robe is unsuitable for use because of size or wear and tear, an order form (#588) for a new robe should be requested from the supreme secretary. When the new robe is received, the old one should be sent to the supreme secretary.

ADMINISTRATIVE

At the start of the new fraternal year (July 1) each district deputy receives an administrative packet that contains refer-

ence materials for use in the district, including expense account forms and the necessary reports from the Supreme Council Department of Fraternal Services.

A programming packet, which contains the "Charter, Constitution and Laws," a complete set of Service Program handbooks and sample materials included in the "Surge ... with Service" program kit, is forwarded for his reference and use. Materials on the current membership campaign are sent to each district deputy in July and throughout the fraternal year.

At the conclusion of his term in office the district deputy is required to turn over all articles of district deputy equipment and files in his possession to the successor of his district.

REPORT OF COUNCIL STATUS

District deputies are required to complete the District Deputy Semiannual Report on Council Status, (#944A, #944B) - every six months for each council in the district. Form #944A covers the period of July-December and is due at the Supreme Council office by Dec. 31. Form #944B covers the period of January-June and is due at the Supreme Council office by June 30. Visits to the councils in the district will reveal outstanding efforts and achievements, as well as areas of concern. Discovery of a problem in its early stages and reporting it to the state deputy and the Supreme Council office by using a special letter or the District Deputy Semiannual Report on Council Status, allows for prompt follow-up to be made. These reports will be automatically mailed in April and November each year.

COLLECTION OF FUNDS

An important part of the financial welfare of the council is the collection of dues from members. The district deputy must be sure that all council officers, especially the grand knight, financial secretary and treasurer, follow the proper procedures in the collection of funds. Also, the district deputy must be sure that council officers understand and follow the proper billing procedures of the Notice of Intent to Suspend (#1845) reten-

Forward completed report to: Knights of Columbus, Supreme Council Office, DOFS
1 Columbus Plaza, New Haven, CT 06510-3326
Mail white copy to state deputy. Retain green copy in district deputy files.



**DISTRICT DEPUTY SEMIANNUAL REPORT
ON COUNCIL STATUS**

State/Province: _____

REPORTING PERIOD - JULY THROUGH DECEMBER
DEADLINE FOR SUBMISSION - DECEMBER 31

District No.: _____

(Print or type all information)

Council #: _____ Location: _____ (City) _____ (State/Province) Date of Report: _____

COUNCIL DEADLINE

- Election of Officers (Form #185) - Deadline: July 1 for receipt at Supreme Council office.
- Service Program Personnel Report (Form #365) - Deadline: August 1 for receipt at Supreme Council office.
- Semiannual Council Audit Report (Form #1295) - Deadline August 15 for receipt at Supreme Council office.
- July Per Capita Tax Assessment - Deadline: October 10 for receipt at Supreme Council office.
- IRS Form 990 - Return of Organization Exempt From Income Tax - Deadline: Fifteenth day of the fifth month following the close of the council's annual accounting period.

ORGANIZATION

1. Are council officers knowledgeable of their duties? Yes No
 2. Are council officers performing as they are expected? Yes No
 3. Do council officials regularly attend district meetings? Yes No
 4. District deputy has inspected the council books and financial records and certifies that these records comply with the Order's laws and rules. Yes No
- Number of district meetings held during July-December: _____

MEMBERSHIP

1. Is the council conducting an effective membership recruitment campaign? Yes No
2. Do the grand knight and financial secretary reconcile the council's membership transactions reported by the Supreme Council office on the monthly Grand Knight's Membership and Financial Statement (Form #1189) and the Council Billing statement (Form #F056)? Yes No

INSURANCE PROMOTION

1. Is a field agent assigned to this council? Yes No
2. Is the council conducting an overall insurance promotion program? Yes No
3. Is the financial secretary providing copies of the Membership Document (Form #100) to the agent immediately following First Degrees? Yes No
4. Does the field agent participate in council functions? Yes No
5. Do you expect this council to achieve its insurance member quota? Yes No

SERVICE PROGRAM

1. Is this council operating under the recommended Service Program structure? Yes No
 2. Status of program: Excellent Good Fair
 3. Does this council sponsor a Columbian Squires circle? Yes No
 4. Status of circle: Excellent Good Fair
 5. Is council interested in instituting or reactivating a Columbian Squires circle? Yes No
- If yes, Contact Name: _____ Address: _____

NEW COUNCIL DEVELOPMENT

1. Number of church parishes in total membership of council: _____
2. Could a new council be developed in this area? Yes No

OVERALL STATUS (Outline council strengths, weaknesses, achievements, etc.):

District deputy recommendations suggested to council leadership:

Signed: _____ District Deputy # _____

Street Address _____

City and State or Province _____ Zip or Postal Code _____

DISTRICT DEPUTY SEMIANNUAL REPORT ON COUNCIL STATUS (#944A, #944B) -- A council evaluation report is to be completed by the district deputy every six months for each council in the district. Form #944A should be used to document the status of each council for the period of July through December and is due by Dec. 31. Form #944B should be used to evaluate each council for the period of January-June and is due by June 30.

tion program. (See the 1845 PROCEDURES section of the REFERENCE section)

DISABILITY WAIVER

The disability waiver, covered in Section 118(e) of the "Charter, Constitution and Laws," provides that any member who is disabled by bodily injury or disease and cannot engage in any occupation of paying employment for a period of six consecutive months may apply for relief from all council dues and all Supreme Council and state council per capita charges. The Application for Relief from Payment of Council Dues and Supreme and State Council Per Capita Charges (Form #1831), available from the Supreme Council Department of Membership Records, and evidence of total disability (see form for the type of evidence required) must be furnished to the Supreme Council. The form must be signed by the disabled member, the grand knight and the financial secretary. All disability waivers expire on Dec. 31 of each year and must be renewed during the 90 days before expiration. The Supreme Council office will request confirmation of continued disability in October, which must be signed by the grand knight and the financial secretary and returned to the supreme secretary.

OFFICERS' FAILURE TO PERFORM DUTIES

When an officer of a subordinate council fails or refuses to perform the responsibilities of his office, the district deputy may declare that office vacant. He must report at once to the state deputy and supreme secretary any deposition or suspension made by him. If the vacancy will not be filled according to the "Charter, Constitution and Laws," the district deputy appoints a member of the council to the office for the unexpired term.

TRAVEL OUTSIDE OF DISTRICT

District deputies may act outside their districts on the request and approval of their state deputy. If a district deputy is asked to go outside his district, the consent of the state or territorial

deputy of the other jurisdiction is necessary. No expenses are chargeable to the Supreme Council for duties performed outside a district or jurisdiction unless these actions are authorized by the board of directors or supreme knight and up to the limits indicated on the Expense Report Form (#267).

RULES RELATING TO EXPENSE ACCOUNT

The board of directors allots a fixed budget to each jurisdiction for certain expenses of the state and district deputies for a fraternal year. Specific rules relating to expenses of the district deputy are found on the Expense Report Form (#267).

Allowable expenses of new council development, including the "institutional allowance" are outlined in the New Council Development Guidelines (#2119).

INFORMATION RESOURCES

The district deputy will find it helpful to review each issue of *Columbia*, *Program Supplement* (P.S.) and *Knightline* (issued 18 times a year), and *Squires Newsletter* (issued monthly). The *District Deputy Reminder*, mailed with monthly membership reports, provides a summary of programs and approaching deadlines. These communications will keep the district deputy posted on matters that concern every member of the Order.

AWARDS PRESENTATIONS

Each year the Star Council, Father McGivney, Founder's and Columbian awards are forwarded to the district deputy of record (except where otherwise requested by the state deputy) for presentation. He is asked to present these awards to the council at an appropriate ceremony or occasion. The district deputy should invite the insurance representative to assist in all council award presentations, especially for the Founders' Award. (Note: If the council wins only the Founders' Award, it will be forwarded to the general agent of record for presentation. See the "Awards" section of the "Surge ... with Service" manual [#962] for details on criteria.)

DISSOLUTION OF COUNCILS

Whenever the board of directors orders a council dissolved, the district deputy follows any directions he receives from the supreme secretary regarding the transfer of memberships and the disposition of books, papers, records, accounts and monies of the council.

DISSOLVED COUNCILS

A new council may not be established in a location that was the site of a dissolved council without first obtaining approval from the board of directors. The procedure calls for the state deputy to direct a letter of permission to the supreme secretary before any steps to organize are taken. The matter of any existing indebtedness due the Order from the former council is reviewed by the supreme secretary and the state deputy to determine the appropriate action.

CEREMONIALS RESPONSIBILITIES

The district deputy plays an important role in each of the Order's ceremonials from the installation of officers to the exemplification of the Third Degree. He must be certain that all ceremonials conducted in his district conform to the guidelines established by the Supreme Council.

INSTALLATION OF OFFICERS

It is the district deputy's duty to install the officers of the councils in his district. The installation ceremony is detailed in the Installation of Officers booklet (#770) that is part of the district deputy materials included in the district deputy administrative packet received in July.

COUNCIL OFFICERS JEWELS

A complete set of council officers' jewels is 15 in number. The jewels can be bought individually or as a set. All inquiries and requests for officers' jewels should be directed to the Supreme

Council Supply Department. A complete listing of the council jewels can be found in the Supply Catalog (#1264).

DEGREE EQUIPMENT

Each council is responsible for possessing the proper equipment necessary for degree work. A list of First Degree accessories is included in the Knights of Columbus First Degree Ceremonial Booklet (#2080) and will be supplied by the degree teams. All items must be bought from an accredited Knights of Columbus supplier (see Supply Catalog #1264 for the listing of suppliers).

Old and worn out ceremonial books should be returned to the Director of Ceremonials, Knights of Columbus Supreme Council, 1 Columbus Plaza, New Haven, CT 06510-3326 (by certified or registered mail marked "Personal") so that they may be replaced with new ones. If the ceremonials are missing and cannot be accounted for, a letter must be sent to the director of ceremonials explaining the circumstances and requesting new ceremonials booklets. Replacement costs of books lost or unaccounted for are charged to the subordinate council. Lost Second and Third Degree Books are charged to the State Council. Once a council degree team is certified, it does not need to be recertified by a succeeding district deputy.

DRESS

The dress for degree officers in the First, Second and Third degrees is robes. A First Degree team may exemplify degrees by wearing the jewel of office over a business suit until robes are purchased. Under no circumstances are First Degrees to be delayed due to a lack of robes.

DEGREE TEAMS

It is the duty of the district deputy to see that the ceremonials are exemplified in accordance with Section 244 of the "Charter, Constitution and Laws." The First Degree is under the direct supervision of the grand knight of the council. The grand knight appoints members of the team. The district deputy certifies the First Degree teams in his district on Form No. 543. It is also his responsibility to certify backup members for council degree teams using the same criteria as certifying the original council degree team. The names of the backup members together with their position on the team are to be reported to the Supreme Council Ceremonial Department on the Request for Certification Cards Form No. 529. Certification cards for the individual team members and the certificate for the degree team will be sent to the district deputy for presentation. For subsequent degrees he files the District Deputy's Degree Exemplification Report Form No. 450 for a First, Second or Third Degree in his district. At the bottom of this form the degree team evaluation asks for the observations of the district deputy of the team. He should make his remarks there.

TEAM MEMBER RESPONSIBILITIES

In every instance the officers in charge of the exemplification of the degree must assume and faithfully execute the responsibilities of demanding strict decorum among the members present and assisting in the initiatory ceremony. Officers must be punctual in beginning degree work and conduct and exemplify it in a manner consistent with the ceremonial as prescribed in the book. Priests, Bishops, Archbishops and Cardinals participate in the degrees by observation only. In every exemplification the greatest care should be exercised in



**KNIGHTS OF COLUMBUS
DISTRICT DEPUTY CEREMONIALS REPORT**



(To be completed after all councils in your district have been visited.)

STATE/PROVINCE: _____

DISTRICT NO. _____

(Please print or type all information.)

1. Indicate whether each council sponsors a First Degree team. If not, indicate if council is interested in organizing a degree team. (Check the appropriate boxes provided.)

| COUNCIL NO. | LOCATION <small>(City/Town)</small> | YES | NO | INTERESTED | NOT INTERESTED |
|-------------|--|--------------------------|--------------------------|--------------------------|--------------------------|
| _____ | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| _____ | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| _____ | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| _____ | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| _____ | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| _____ | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2. List below your comments regarding each council that does not sponsor a First Degree team.

3. Are council meetings conducted in accordance with prescribed "Order of Business" mandated by Supreme Council? Yes No

Date of Report: _____

Signed: _____

District Deputy

(Print Name and Address)

It is important that each council sponsor its own First Degree team in order that frequent degrees may be scheduled without delaying candidates from becoming members.

FORWARD TO: Director of Ceremonials

COPIES TO: State Deputy
State Ceremonials Chairman
District File

#2408 5/96

DISTRICT DEPUTY CEREMONIAL REPORT (#2408) – To be completed once during his term after the district deputy has visited all the councils in his district. The form includes spaces for listing information on which councils currently sponsor First Degree Teams. The completed form is forwarded to the Supreme Council Director of Ceremonials with copies going to the state deputy, state ceremonials chairman and the district deputy's own file.

the manner of dress and paraphernalia and in appearance so that the candidates may be favorably impressed. Any conduct unbecoming a Catholic gentleman is condemned most emphatically. Smoking, liquor, laughter, boisterous conduct on the part of any member attending or assisting at a degree is prohibited. Bars shall be closed before and during the exemplification of any degree in that chamber. No exceptions.

For all team members: memorization is mandatory, oratorical skills are important, appearance must be appropriate. Always remember that a degree is to create a lasting impression. Paraphernalia must be clean, well pressed and fit.

The state deputy is responsible for all Second and Third Degrees in his jurisdiction. It is the responsibility of the State Deputy to schedule the CO's, ADD's, and the Team. It is also his responsibility to approve the site of the degree as well as the degree date. A district deputy may request a team of his choice as well as date and site of the degree; however, the final decision rests with the state deputy. Of course the state deputy may work through the state ceremonial chairman in accomplishing these duties. In the final analysis, the state deputy alone is responsible for the proper degree work in his jurisdiction.

REGISTRATION

The registration of candidates is the responsibility of the host council. The grand knight should assign members to be registrars of the candidates. Each candidate's credentials must be checked prior to entering the antechamber or the assembly area. No one should enter the chamber or antechamber or assembly area who is not known or not a member. Sign in sheets need to be maintained for candidates and members. A ribbon or some other means of identification should distinguish the candidates from the members. The local council is to provide this identification in the form of a ribbon, candidate badge, sticker or some other means of identification. Under no circumstances can candidates be required to purchase any item to be part of a degree. At the exemplification of the First Degree, only new members sign the constitutional roll. The constitutional roll is a record of the membership of that individ-

DISTRICT DEPUTY'S DEGREE EXEMPLIFICATION REPORT

Date: _____

TO: SUPREME KNIGHT

FROM: DISTRICT DEPUTY _____
(Name — Please Print)

DISTRICT NUMBER _____ **STATE OR PROVINCE** _____

A **FIRST** **SECOND** **THIRD** DEGREE EXEMPLIFICATION, HONORING

_____, WAS HELD IN MY DISTRICT
(Name of Honoree, If Designated)

ON _____ AT COUNCIL NUMBER _____
(Date of Exemplification)

THE CEREMONIAL TEAM FROM _____ CONDUCTED
(Council Number or District Number)

THE EXEMPLIFICATION. A REPORT OF PARTICIPATING COUNCILS IS PRINTED BELOW.

| COUNCIL NUMBER | DISTRICT NUMBER | NUMBER OF CANDIDATES |
|----------------|-----------------|----------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

DEGREE TEAM EVALUATION

Scoring: "0-10" (0 — Poor 10 — Excellent)

MEMORIZATION _____ EXPRESSION _____ GESTURES _____ MODULATION _____ AUDIO _____
VOICE QUALITY _____ PARAPHERNALIA _____ OVERALL EFFECTIVENESS _____

GENERAL OBSERVATIONS: _____

Signed: _____
District Deputy

_____ Street Address

_____ City and State or Province _____ Zip or Postal Code

DISTRICT DEPUTY'S DEGREE EXEMPLIFICATION REPORT (#450) -- To be completed by the host district deputy following each degree exemplified in his district, listing councils and districts participating, as well as the number of candidates supplied by each. The "Degree Team Evaluation" should be completed in its entirety. Additional copies are available by checking the appropriate box at the bottom of the form or contacting the Supreme Council Ceremonials Department.

ual council. When more than one council participates in the exemplification of a First, Second or Third Degree, never use the constitutional roll as the registration paper. Use different paper for that. Only members of that council are to sign that constitutional roll. At registration have all dignitaries, officers and members remove all name badges, jewels of office, excessive lapel pins and items of apparel that denote that they are of high rank.

COUNCIL MEETING

The council meeting is the real first ceremonial of our Order. The district deputy needs to work with his assigned councils to make certain that they are operating their meetings in compliance with the *Charter, Constitution and Laws* of the Order. The grand knight should be using Form #1937 to conduct the meeting. The district deputy must always set the example. Whenever he addresses the grand knight he should stand and do the proper salute and say "worthy grand knight" and should get the proper response back from the grand knight. When the members see the district deputy is following the prescribed rules and operating in accordance with protocol, the members will follow.

FINANCIAL RESPONSIBILITIES

FINANCIAL MATTERS

The proper handling of the finances of a council is a serious matter. The "Charter, Constitution and Laws" provides that the district deputy shall (1) inspect the books, vouchers and accounts of the councils within his district, and may at any time examine them, and (2) require the accounts of the councils be kept in books furnished by the supreme secretary in the manner provided by law.

SEMIANNUAL AUDIT

The semiannual audit of the books and records of the financial secretary and treasurer is an important matter. The dis-

district deputy is responsible to see to it that the grand knight and the trustees of each council in his district perform this duty by conducting and submitting the Semiannual Council Audit Report (#1295). The report for the period of July 1 to Dec. 31 is due at the Supreme Council office by Feb. 15. The report for the period of Jan. 1 to June 30 is due at the Supreme Council office by Aug. 15. These reports can be found in the Council Report Forms Booklet (#1436) and on the Order's Web site. See the Grand Knight's Handbook (#915) for details. Failure to submit the semiannual audit can cause a council to forfeit the bond coverage for its financial secretary and treasurer.

BONDING

The financial secretary, upon appointment by the supreme knight, is automatically bonded in the amount of \$5,000. Additional bonding, up to a maximum of \$125,000, can be provided at a cost of \$7 per thousand. The same applies to the council treasurer when the Report of Officers Elected for the Term (#185) is received. Failure to submit the semiannual audit can cause a council to forfeit the bonding covering its financial secretary and treasurer.

MEETINGS

Communication and organization are vital to the success of every district. To achieve this at least two district meetings are recommended and a series of strategy meetings to monitor district activity and progress should be scheduled as needed.

DISTRICT ORGANIZATIONAL MEETING

It is the duty of the district deputy to see that council officials understand their duties and responsibilities. As soon as possible after July 1, a joint meeting of grand knights, financial secretaries, treasurers, membership directors, program directors and field agents from the councils in the district should be held. This meeting should be held at a convenient location and

the agenda set to cover all subjects to be discussed. A sample district meeting outline can be found on page 19.

The district deputy should arrange for this meeting within two weeks of the jurisdiction's organizational meeting, by determining the date and place of the district meeting. Council officers and key membership and programming personnel should be invited to the meeting and urged to attend.

The meeting should cover subjects thoroughly. The district deputy presides and a secretary is designated to keep minutes of the proceedings, with the date, place, names and titles of attendees, matters discussed and conclusions made.

At the district organizational meeting, the district deputy should explain in detail the duties of each officer (see the DUTIES OF OFFICERS in the REFERENCE section). The video *Those Who Serve* is available from the Supreme Council Department of Fraternal Services. This 14-minute production defines the duties of each officer and is suggested for use at general council meetings, especially the first meeting held early in the fraternal year for council officers. It is excellent for use with newly organized councils. Refer to the sample organizational/mid-year district meeting outline for more information.

DISTRICT MID-YEAR MEETING

In addition to the organizational meeting, the district deputy should conduct a mid-year meeting with council officials immediately following the state council mid-year meeting. Rather than training, the mid-year meeting can focus on energizing membership recruitment, retention and new council development programs, and communicating information from the state council meeting. Discussions should center on attaining district and council fraternal year goals. Refer to the sample organizational/mid-year district meeting outline for more information.

STRATEGY SESSIONS

The district deputy should conduct at least one strategy session a year with the grand knight, membership director and

program director of each council. The purpose of this strategy session is to assess the action plan for membership recruitment and service program activities. If a council has not developed a yearly plan (with at least 6 months of activities firmly set with dates and locations), the district deputy should help set such a plan at the strategy session. No session should end without plans of action being committed to. This strategy session should be held in late August or in September.

If the council has not followed through on their original plan or its results have not been satisfactory, a second session might be scheduled. This second session, held in January, should concentrate on areas needing improvement.

Because of the nature of this type of meeting, these Strategy Sessions must be held one council at a time. This is NOT your district meeting. It is at this session that the district deputy can really be that guide, that motivator, that helping hand. Remember, a council that fails to plan, can plan to fail.

VISITS TO COUNCILS

When visiting the councils of his district, the district deputy is doing the work that the state deputy personally would like to do were it possible for him to call on all councils. He is the supervisor of all the councils in his district, a position that can be compared to the manager of any business that operates from several locations. He should visit each council regularly at least once every quarter. He should be present at all degree exemplifications in his district.

So that his official visits may be given proper recognition, the council should be notified well in advance of the date. The grand knight should advise the members of the district deputy's visit. The district deputy's message must be carefully prepared, upbeat and inspirational. An outline of suggested remarks for council visits is provided on page 21.

Before an official visit to a council, the district deputy should meet with the council officers, including the trustees. The financial secretary, treasurer and recorder should bring their

ORGANIZATIONAL/MID-YEAR DISTRICT MEETING OUTLINE

The purpose of holding semiannual district meetings with council officers and key membership/programing personnel is to make sure that information provided to the district deputy at state meetings is passed along immediately to his councils. To be as informative and effective as possible:

- The meetings should be held within two weeks of the state meeting.
- The insurance field agent(s) should be invited to participate.

The recommended meeting agenda is:

A. OPENING PRAYER

B. MEMBERSHIP

- Explain fraternal year goals and quotas – Order, state, district and council.
- Schedule degrees (First, Second, Third) – six month period
- Introduce/Assess recruitment plan.
 - * Supreme Council program
 - * State Council goals/program
 - * District and council action plans
 - * *How to...* recruitment booklet (#2769)
 - * Review samples of membership materials
- Outline retention program.
- Present insurance program.
- Announce/Assess incentive program.

C. PROGRAMS

- Supreme Council
- State Council

D. CORRESPONDENCE/COMMENTS

E. CALENDAR OF EVENTS

- Review scheduled events within the district.

F. OTHER ITEMS OF INTEREST

- Set date for next district meeting.

G. CLOSING PRAYER

books to this meeting. He inspects these books to ascertain if all required entries have been made promptly and properly. If the council sponsors a Columbian Squires circle, the district deputy should also plan to meet with the circle's advisory board, (grand knight, deputy grand knight and chaplain), the chief counsellor and chief squire, to discuss the status of the circle and suggest areas for improvement.

If the council does not sponsor an active Squires circle, the district deputy should inquire about council interest in instituting or reactivating one. The district deputy may use his Semiannual Report on Council Status (Form 944A, 944B) or may call (203) 752-4403 to order a Squires Inquiry Kit to begin development of a Squires circle, with assistance from the state squires chairman or a member of his committee. The district deputy shall announce upcoming Second and Third degree exemplification dates during all council visits.

MEMBERSHIP GROWTH RESPONSIBILITIES

The district deputy's responsibilities in the area of membership recruitment fall into many categories. The district deputy is responsible for the promotion and evaluation of all membership recruitment, retention and insurance promotion activities and council and circle growth within his district.

It is the district deputy's responsibility to see that all councils in his district conduct active year-round membership recruitment programs. He verifies the appointment and reporting of all membership committee personnel to the Supreme Council office by the Service Program Personnel Report (#365). This ensures that these members receive the information they need to conduct membership recruitment programs.

RECRUITMENT

Once the recruitment committee is formed, the district deputy should work with its members to plot out recruitment strategies, including setting goals and planning organized events such as "The Blitz," open houses, church drives and member-

SAMPLE DISTRICT DEPUTY COUNCIL MEETING VISITATION REMARKS

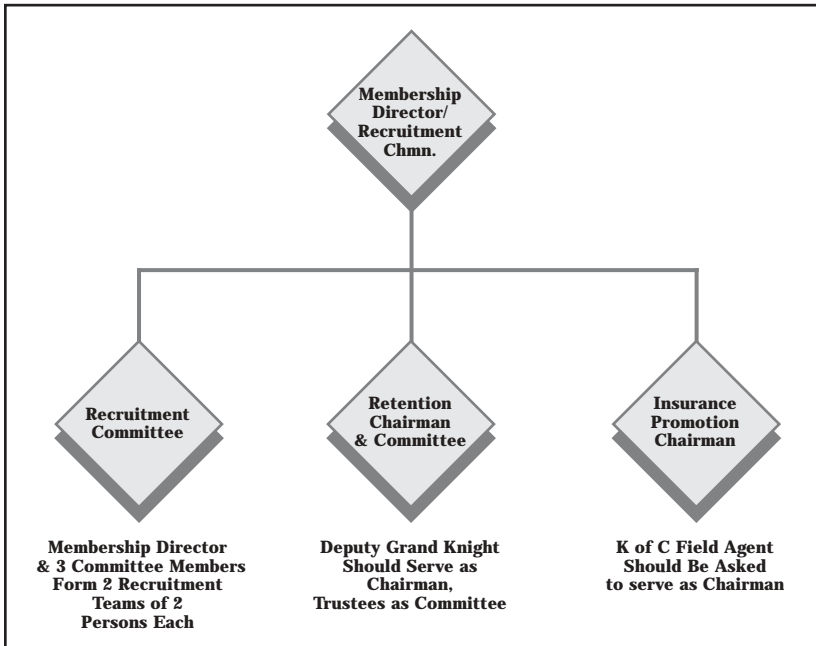
The "Method of Conducting a Council Meeting" (#1937) calls for a report to the general membership by the district deputy.

Remarks should be brief and to the point, highlighting the items listed below. In the interest of keeping the council meeting agenda on schedule, in most instances it is recommended that the district deputy's remarks not exceed five minutes in length. Below is a suggested outline of remarks for use during the district deputy report.

- **Evaluate membership status**
 - Provide a district membership update
 - Analyze progress toward council quotas/goals
 - Announce First, Second, Third degrees scheduled
 - Explain current Supreme Council/state council membership campaign specifics
- **Highlight Information from recent issues of monthly newsletters:**

District Deputy Reminder, Knightline/Program Supplement and Squires Newsletter.
- **Review checklist of important dates/calendar of events**
 - Supreme Council
 - State Council
 - District

ship invitation programs. The recruitment committee should form recruitment teams for two-on-one recruitment. The need for one-on-one recruiting by all members must be stressed. *The How To...* booklet (#2769) should be reviewed as a valuable guide to conducting a successful recruitment program.



An active Service Program in each council is a valuable asset in recruiting new members. Activities show potential Knights and their families what Knights do to assist their communities and the Church. Members who are involved in programs are less likely to become inactive. These active Knights are vital to the survival of any council. (See THE SERVICE PROGRAM section)

It is the district deputy's duty to compile a schedule of First Degree exemplifications (see CEREMONIALS RESPONSIBILITIES section) in his district. Councils should be encouraged to hold at least one First Degree every other month. He should assist councils in developing First Degree teams and training backup members for teams that already exist.

Every council should establish an Admission Committee to interview prospective Knights. The Admission Committee

process enables each prospect to learn about how the council functions and its activities, as well as enabling the council to learn of the candidates' interests.

When candidates are initiated, the district deputy ensures that proper entries are made upon the council records, and that the Membership Documents (#100) are forwarded promptly to the supreme secretary. He also sees that the "Charter, Constitution and Laws" of the Order are followed as they relate to applications for membership and Admission Committee procedures. (see Applications for Membership and Admission Committee in the REFERENCE section).

The district deputy helps councils set long-term membership recruitment programs and strives to achieve Star District status and Star Council status for all his councils.

RETENTION

Retention is another area of membership responsibility. The best recruitment efforts are worthless if a council can't keep its current members. To make sure that a council is meeting the needs and interests of its current members, the district deputy should review the Admission Committee responsibilities and procedures with officers and members. To aid councils in their retention efforts he should review the council books and audits regularly to ensure that billings are being properly done and to keep a check on the number of delinquent members. The district deputy should monitor the council's handling of billing procedures and delinquent accounts.

Retention begins during the recruitment process. The more a man knows about the Order, the greater his interest in the Knights of Columbus will be. The district deputy must encourage councils to stay in contact with all members. If an active member has stopped attending meetings, a council representative or his proposer should call to inquire if he is well, and to let him know he has been missed and is needed.

The district deputy should see that all of his councils have an active retention committee. The retention committee is respon-

sible for determining the causes of suspensions, and for addressing the needs of individual members in danger of becoming suspended. This committee should make recommendations to the council for changes based on information gathered from delinquent/suspended members. The retention committee should contact nonactive members before they become delinquent in their dues to determine reasons for lack of participation. The committee should suggest solutions acceptable to both the member and the council. Also, the committee members should see that the 1845 billing procedures are followed, remembering that the delinquent member is still a brother Knight and an asset to the council.

Also, the district deputy should be sure that council officers understand and properly follow the Notice of Intent to Suspend (#1845) procedures. (see REFERENCE section) Under the 1845 procedures, upon receiving his copy of the "Notice of Intent to Suspend," the district deputy must make personal contact, as soon as possible and within 10 days, with the delinquent member to discuss the nonpayment situation. Suggestions as to a possible solution should be recommended, and the district deputy will volunteer to assist the member, if the need exists. The district deputy determines whether personal contact has been made by the council. The response and reaction received from the delinquent member is recorded on the reverse side of the "District Deputy Copy" of Form #1845 and then sent to the state deputy for review.

NEW COUNCIL DEVELOPMENT

The ultimate goal of new council development is to expand the Order and present the opportunities of membership to eligible Catholic men. The district deputy is responsible for assessing his area for potential new council development sites. These sites include areas where multiple parishes are served by one council, parishes with no council affiliation and parishes where Knights of Columbus Round Tables exist. Once a site is identified, the district deputy should contact the state deputy or state new council development chairman.

The district deputy or appropriate state officials should make preliminary contact with the pastor of the parish that is a

potential new council site. The pastor's reception to the possibility of a council in his parish should be gauged, and if it is positive the jurisdiction's new council development plan can be put into action.

Depending on the jurisdiction's strategy for new council development: the district deputy will act as point man for the development of the new council; a diocesan/regional/new council development site team will develop the council; or a state team will undertake the effort.

When developing a new council the district deputy should keep in mind that Section 99 of the "Charter, Constitution and Laws" provides that a council can only be instituted after a minimum of 30 members have made application thereto and received the First Degree of the Order. It is recommended that these 30 members be comprised of new or former members. There are no restrictions as to the number of members who may transfer to the new council, but good judgment indicates that a new council should not be established solely on the basis of transfers.

Detailed New Council Development Guidelines (#2119) are available from the Department of Council Growth and Development at the Supreme Council office by calling (203) 752-4651.

COUNCIL RETENTION

The district deputy should pay close attention to any councils exhibiting problem characteristics - councils under suspension for nonpayment of Supreme Council assessments and councils that are not suspended but are showing "warning signs" including:

- Lack of participation in state meetings and programs
- Low membership (less than 30 members)
- Failure to add at least one new member per year
- Poor or nonexistent programming activities
- Poor meeting attendance or no meetings
- Failure to complete Supreme Council or state council report forms

Upon spotting these problems, the district deputy begins to work personally with existing council officials to address each area outlined for correction. He can solicit support from the state council and the Supreme Council office if needed.

The district deputy has the duty of investigating the feasibility of reactivating dormant councils in his district. These dormant councils are ones that show no activity (i.e.: no officers, no meetings, no filing of forms, no activities) but have not been dissolved by the board of directors. He should first visit with the pastor of the parish that the dormant council is affiliated with and see if there is interest in reactivating it.

If there is interest, the district deputy should contact the state deputy and the Supreme Council Department for Council Growth. He will then receive the council reactivation guidelines and a council roster. Following the reactivation guidelines, the district deputy, with the help of the pastor, state officials and council members should start the reactivation process.

INSURANCE PROMOTION

The district deputy works with the assigned insurance field agent to assist each council in meeting its insurance quotas. He promotes the availability of the Order's insurance products and the accessibility of the field agent to members. The district deputy should ask councils to provide visibility and support to field agents and encourage the financial secretaries and field agents to develop working relationships to ensure that they provide the best service possible to the members. He should also promote the New Member Insurance plan among councils.

DISTRICT MEMBERSHIP REPORT

DISTRICT DEPUTY REPORT (#F049) - Each district deputy receives a monthly report detailing monthly and year-to-date annual award statistics and a financial statement summary for every council in his district, as well as district totals.

Fraternal year quotas for councils with 30-100 members are an increase of five membership additions over deductions and three insurance additions over deductions based on the total

membership of the council as of July 1. The quotas for councils with 101 members or more are a 5 percent increase of membership additions over deductions and a 2.5 percent increase of insurance additions over deductions based on the total membership of the council as of July 1. A minimum council membership of 30 members is required. Councils appearing on the report that do not have quotas listed will be manually calculated at the end of the fraternal year.

Quotas appearing in the "DISTRICT TOTALS" section of the report reflect a percentage of the sum of all council membership and insurance net gain quotas for the district. District deputies must attain a net gain of 100% or more of the district membership and insurance quotas to be eligible for the Star District Award. The requirements for the Star District Award are printed on the reverse side of the report. It also displays the status of each council as listed in the Supreme Council office records. This information is included under the "Membership for the Council as of" portion of the report. There are three messages that will be used in this status area: "In Good Standing," "Pending Suspension," and "Suspended Since (date)."

INSURANCE

FRATERNAL/INSURANCE RELATIONSHIP

The Order's insurance is an important fraternal benefit available to all qualified members and their families. The district deputy should establish a close working relationship with the insurance agent or agents who serve his councils.

The field agent's contributions to a district are many. Not only will he endeavor to provide needed life insurance protection to members and their dependents, he can also be of enormous help in membership recruitment and new council development. The agent is a well-trained professional who knows how to sell membership in the Order as well as his outstanding portfolio of products.

DISTRICT DEPUTY'S REPORT

DISTRICT STATE DATE

| | | | | | | | | | | FINANCIAL STATEMENT | | | | | | | | | | | |
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| MEMBERSHIP | | | | | | | | | | | CHARGES PER CAPITA | | | | | | | | | | |
| INSURANCE | | | | | | | | | | | CASH ADV | | | | | | | | | | |
| MEMBERSHIP FOR COUNCIL AS OF | | | | | LAST CASH PAYMENT RECEIVED | | | | | LESS DEDUCTIONS | | | | | | | | | | | |
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| COUNCIL | WASH | COUNCIL | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | PREVIOUS BALANCE | 0 | | | | | | | | | |
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| COUNCIL | WASH | COUNCIL | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | PREVIOUS BALANCE | 0 | | | | | | | | | |
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| COUNCIL | WASH | COUNCIL | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | DUPLICATE | PREVIOUS BALANCE | 0 | | | | | | | | | |
| MEMBERSHIP | | | | | | | | | | | CHARGES PER CAPITA | | | | | | | | | | |
| INSURANCE | | | | | | | | | | | CASH ADV | | | | | | | | | | |
| MEMBERSHIP FOR COUNCIL AS OF | | | | | LAST CASH PAYMENT RECEIVED | | | | | LESS DEDUCTIONS | | | | | | | | | | | |
| | | | | | | | | | | | CURRENT BALANCE | | | | | | | | | | |
| DISTRICT TOTALS | | | | | | | | | | | | | | | | | | | | | |
| MEMBERSHIP | | | | | | | | | | | | | | | | | | | | | |
| INSURANCE | | | | | | | | | | | | | | | | | | | | | |
| MEMBERSHIP FOR DISTRICT AS OF | | | | | PERCENTAGE OF QUOTA FOR DISTRICT | | | | | | | | | | | | | | | | |

DISTRICT DEPUTY'S REPORT (#F049) -- Forwarded to the district deputy of record each month. Provides a monthly update on current month, fraternal year-to-date membership data, council status, and financial information by council and districtwide. The district totals are used in determining Star District Award Winners.

During the fraternal year, there are many occasions when the district deputy and field agent(s) will work closely together. For example, each council should sponsor an insurance information program for its members - preferably a "Fraternal Benefits Night" conducted by the field agent and the grand knight. The district deputy should be sure that such a program is part of every council's plans. Also, the attainment of the insurance quota is a goal every year. Council membership directors must be encouraged to work with the field agent throughout the year to ensure that quotas are met. A good working relationship between the financial secretaries and field agent(s) is a must for successful insurance promotion.

The Insurance Promotion Award recognizes the top councils in insurance net gain and net percentage gain, in each jurisdiction, for their support of the Order's insurance program. Award requirements are outlined in the awards section of the Surge ... with Service manual (#962). In addition, the field agent should be given maximum exposure to the council(s) he serves. He should be invited to district meetings and introduced to council leaders. His name and telephone number should be a part of every council bulletin. He should be invited, well in advance, to all functions held within the district.

While it is the responsibility of the field agent to personally present the Order's insurance programs, each district deputy should acquaint existing members and prospective members with the advantages of these fraternal benefits. Prospective members should be made especially aware of the New Member Insurance Plan.

NEW MEMBER INSURANCE PLAN

Upon joining the Order a man has the opportunity to accept a low-cost New Member Insurance Plan for himself and his spouse. No medical examination is required. Issue depends on health and becomes effective when approved by the supreme physician. Only standard risks are issued. Because of this unique rate, a member and his wife are eligible for only one New Member Insurance Plan each and only upon his joining the Order. If the applicant is single, his wife becomes eligible at the time of marriage. To apply for the New Member Insurance Plan, the new Knight should contact the field agent

or financial secretary. Acceptance of the New Member Insurance Plan counts as an insurance addition toward meeting the quota for the Founders' Award.

MEMBER BENEFITS

The district deputy should urge councils to promote the availability of the many fraternal benefits, including scholarships available to current and potential members and their families. Among these benefits are:

- The Member/Spouse Fraternal Benefit that provides free accidental death coverage for all members in good standing (who belong to a council in good standing) and their spouses. The Member/Spouse Fraternal Benefit brochure (#2773) provides a complete explanation of this program.
- The Orphan Fraternal Benefit that endows an \$80 monthly allotment for orphans of eligible families. Also, up to \$7,000 in college scholarships are available.
- The Family Fraternal Benefit that pays - for eligible families - \$1,500 for the child who dies before the age of 61 days; pays \$750 for the child who is stillborn at least 20 weeks after conception; and offers guaranteed-issue insurance up to \$5,000 for any otherwise uninsurable child under age 18. The Family Fraternal Benefits brochure (#2761) introduces and explains the Orphan and the Family fraternal benefits.
- Scholarships and fellowships for members and their families, Squires, and seminarians. The Financial Aid to Education booklet (#951) contains detailed information.

SERVICE PROGRAM

'SURGE ... WITH SERVICE'

The district deputy should impress upon each grand knight in his district that the success of his council depends on worthwhile and interesting activities. Every council should be organized under the Service Program structure. The Supreme

Council furnishes Service Program materials that will assist the council in arranging the program.

The district deputy should be thoroughly familiar with and actively support the Service Program. He should review the *Surge ... with Service* manual (#962). A copy is furnished in the *Surge* programming packet distributed at the start of each fraternal year or can be obtained by calling the Supreme Council Department of Fraternal Services at (203) 752-4270.

Under the banner of *Surge ... with Service*, councils conduct the Service Program to benefit the community, the Church and themselves. Directors are appointed by the grand knight for Church, community, council, family and youth programs. Committees plan council projects and activities. Planning activities at the state and local level assures programs unique to individual state and local needs. Programs range from collecting food for soup kitchens, to sponsoring fund-raisers for Special Olympics, to helping with repairs at a local parish.

Annually in June, *Surge* program kits for the new fraternal year are forwarded to all financial secretaries of record. The kit contains handbooks, manuals, report forms and calendars necessary to implement the Service Program. The financial secretary should deliver this kit to the grand knight immediately for distribution to council officials.

To better inform members about the Service Program the district deputy should recommend that the video *Surge ... with Service* be shown in each council early in the program year. This 20-minute production is available on VHS video-cassette from the Supreme Council Department of Fraternal Services.

COLUMBIAN SQUIRES

The Columbian Squires is the official youth organization of the Knights of Columbus. It provides leadership training to Catholic young men ages 12 to 18. (The Board of Directors has authorized a pilot program Orderwide to lower the age of

joining the Squires to 10 years old.) The program helps young men to build their Catholic identity while helping the Church and community through spiritual, service, social and athletic programs and other fun activities.

The district deputy should encourage Squire membership recruitment, maintenance of a strong team of counselors, development of a Squires ceremonial team, an active program of activities and adherence to the *Laws and Rules of the Columbian Squires*. He should visit with the advisory board and officer team of each active circle in his district and try to attend circle meetings and functions. For more information on the Squires program the district deputy can contact the Department of Fraternal Services at (203) 752-4403.

When a council expresses interest in instituting or reinstating a circle, the district deputy should order an Inquiry Kit from the Department of Fraternal Services or indicate the interest in the appropriate place on the District Deputy Semiannual Report on Council Status (#944A, #944B). The kit will be forwarded to the grand knight or individual designated.

YOUTH PROTECTION PROGRAM

Knights of Columbus policy requires all "Youth Leaders," (any Knight whose position requires a substantial interaction with young people) to submit an application for the position and to pass a background screening before he is appointed.

Squires circle counselors and anyone appointed as an adult leader in a Knights of Columbus-sponsored Boy Scout unit must submit "Youth Leader" applications (Form #4348), including the names of two people as references, and giving permission for a background check. The applications and references will be checked to the satisfaction of the grand knight and state deputy.

The background check, to be conducted through a law enforcement agency, includes a review of the candidate's criminal record, if any, including motor vehicle violations. Appointment to Squire counselor or Scout leader positions is

effective only after a successful background check has been completed. Priests appointed to these positions will not be screened, but the respective diocese will be notified by the Supreme Council office of their appointment.

FREE THROW CHAMPIONSHIP

The annual Knights of Columbus Free Throw Championship is held from January through March. This program gives young people a chance to demonstrate their basketball skills in fun and exciting competition. Specific information on conducting the contest, rules and regulations can be found in the Official Guide Knights of Columbus Free Throw Championship Rules, Regulations, Tips and Information (#1928).

The district deputy conducts the district competition during February, arranging for the site and notifying councils of its date and location. He is responsible for ordering the district winner Free Throw medallions from the Supreme Council office. These are available at no charge, and should be presented to the winners by the district deputy at the conclusion of the district competition. Entry forms/score sheets (#1598) of council winners should be given to the district deputy by the participating councils prior to the competition.

Results of the district competition must be reported promptly to the state youth director or state free-throw chairman for the regional and/or state competition.

AUDIOVISUAL LIBRARY

The Supreme Council offers free recruitment and promotional video productions for training and information purposes. They are available from the Department of Fraternal Services on VHS videocassette. Some titles are available on DVD. The shipping charge for one or two videos is \$3. For three to five videos it is \$5. Allow four weeks for delivery.

The Knights of Columbus audiovisual productions are categorized under the general topics of membership, promotion

and instruction. A complete description of each film and order forms for audiovisual productions available from the Supreme Council office are listed in the Audiovisuals Flyer (#1539). Copies of this flyer are contained in the "Surge ... with Service" program packet. Additional copies can be obtained by contacting the Supreme Council Department of Fraternal Services.

The district deputy should promote the showing of these films in his district. *The District Deputy - Key Link to Our Success* video summarizes the district deputy's duties. Order it from the Department of Fraternal Services.

AWARDS

STAR DISTRICT

To qualify for the Star District Award, a district deputy must attain 100 percent or more of the district membership net gain quota and his district insurance net gain quota. The district quotas are reflected on the monthly District Deputy Report (F049) under the "District Totals" section. The monthly and year to date membership activity is a cumulative total of all council transactions reported. An explanation of the report information is printed on the reverse side of the report. Special award plaques bearing a Star District medallion complemented with a personalized name plate recording the district deputy's name and district number commemorates this achievement.

NEW COUNCIL AWARD

A district deputy has many opportunities during his term of office, but new council development will undoubtedly stand out as the most rewarding of them all. See the New Council Development Guidelines (#2119) for details.

The Supreme Council recognizes those district deputies responsible for the development of a new council with a special award depicting a miniature replica of the Council

Charter and inscribed with the district deputy's name, the new council number and the date of institution.

SUPPLIES

ORDERING MATERIALS

Membership Documents (#100), Requisition Forms (#1) and other forms and materials needed by councils on a regular basis are available from the Supreme Council Supply Department at no charge. Membership recruitment and program materials, as well as a variety of miscellaneous items, are also available. The Supreme Council Supply Catalog (#1264) features a listing of materials.

The Supply Department also accepts fax orders at 1-(800) 266-6340. Only orders that are to be charged to a council, assembly, circle or agency account will be accepted. Request must be faxed on a Requisition Form (#1). Promotional and gift items as well as print orders must be sent on a separate Requisition Form.

The council ordering supplies is responsible for the shipping cost, whether or not there is a charge for the items themselves. Printed materials should be ordered from the Supply Department, Knights of Columbus, P.O. Box 1670, New Haven, CT 06507-0901.

The directions for submitting orders to the Supreme Council as outlined in the Supply Catalog should be read carefully. A Requisition Form (#1) must be used when ordering.

Orders must have the signature of the grand knight or financial secretary. Councils should order sufficient quantities of materials at least one month in advance of your membership event. Videos can be ordered by using the forms from the K of C Audiovisuals flyer (#1539). Videos can also be obtained by writing to the Department of Fraternal Services, Knights of Columbus, 1 Columbus Plaza, New Haven, CT 06510-3326, or calling (203) 752-4270.

There is no district deputy account for ordering supplies. All orders containing charge items to be charged to a council's account at the Supreme Council office must bear the signature of the grand knight or financial secretary. A district deputy is not authorized to charge supply items to the state council account without the approval of the state deputy.

REFERENCE GUIDE

APPLICATION FOR MEMBERSHIP AND ADMISSION COMMITTEE

The following is a summary of the "Charter, Constitution and Laws" relative to membership procedures as they affect applications for membership and the Admission Committee. The district deputy should ensure that these procedures are observed by the officers of the councils in his district:

1. The grand knight of each council must immediately after entering his term of office, appoint an Admission Committee. Within five days after the application for membership is presented to him, the grand knight shall refer the application to the Admission Committee and the chairman of the committee shall immediately notify the applicant to appear before it for examination as to his qualifications for membership.
2. The Admission Committee has the power of rejection only if five members file a written report with the grand knight certifying that the applicant is not a practical Catholic. If this is done said applicant shall be deemed rejected and the facts shall be noted on the application by the grand knight who shall promptly advise the proposer. Whether an applicant is a practical Catholic is for the Church to decide and therefore it is expected that before a written report is filed the committee will discuss the situation with the chaplain of the council or the pastor of the applicant and be bound by the decision of either.
3. Having determined that the applicant is a practical Catholic, the Admission Committee shall submit to the grand knight its report and recommendations within 10 days following the date when the application was delivered by the grand knight to the chairman of the Admission Committee. At the first meeting of the council following

- the receipt by the grand knight of the report and recommendation of the Admission Committee, or upon the expiration of 10 days following the delivery of the application to the chairman of the Admission Committee, if there is no report from the Admission Committee with respect to the application, the grand knight shall read the application. Except when notice of application shall be published as provided in Section 110, the council shall proceed (at the same meeting) to ballot for the admission of such applicant after the reading. Prior to balloting after the first and only reading, the warden determines and reports to the grand knight and the deputy grand knight the number of members present and the recorder records in the minutes of the meeting the warden's report.
4. The grand knight cannot delay the processing of the application under any circumstances. Unless the application is rejected because the applicant is not a practical Catholic as shall be determined by at least five members of the Admission Committee, the grand knight reads the application at the first meeting following the 10 days allowed for the report of the Admission Committee. This reading is not restricted to a regular meeting or a business meeting.
 5. Balloting shall be on a blank slip of paper that each member shall write either "yes" or "no" on and nothing more.
 6. Balloting for candidates is the warden's responsibility. After exhibiting the ballot box to the grand knight and deputy grand knight, the warden deposits the box on the salutation table and takes his place six feet from it. He then requests that all officers vote by depositing their ballots in the ballot box and after they have voted, that the members who wish to vote do so in the same manner. They advance in a single file and deposit their ballots. After all who desire to do so have voted, the warden exhibits the ballot box to the grand knight and deputy grand knight and they examine and count the ballots. If the number of negative ballots does not exceed one-half of the members present, the applicant is elected. The grand knight announces the result but the exact number of negative ballots is not stated. The law requires a negative vote of more than one-half present and not a negative vote of one-half of those voting.
 7. If more than one candidate is to be balloted for at a meet-

ing, the grand knight may announce that the ballot shall be a general one upon all the candidates. If not more than one-half of those members present shall cast negative ballots on such a general ballot, no other ballots shall be taken and all candidates so balloted for shall be declared elected. If more than one-half negative ballots of those present are cast upon said general ballot, an individual ballot shall then be taken on each candidate.

8. Applications for membership from priests and religious shall not be referred to the Admission Committee but shall be presented directly to the council for balloting within 10 days after they are received by the grand knight.
9. The revision of the laws by the Supreme Council at its 1968 meeting imposes another duty on the Admission Committee in cases of reapplication by a former member who has been suspended for a period of more than seven years. The amendment requires the applicant to be approved by the Admission Committee as though he were a new member. In addition, the reapplicant must establish to the satisfaction of the committee that he has received the degrees of the Order. If this cannot be established the reapplicant is required to take any or all degrees.

BENEFITS OF MEMBERSHIP

The Knights of Columbus has many benefits available to members and their families. Every prospect and member should be made aware of these benefits for his welfare and that of his family. They include:

COLUMBIA MAGAZINE: Each member receives a free subscription to the Order's monthly magazine examining issues of concern to Knights, to Catholics and to families.

K OF C ROSARY: During his First Degree each new member receives a rosary blessed by the supreme chaplain.

DAILY MASS REMEMBRANCE AT ST. MARY'S CHURCH: A daily Mass for deceased members and their wives and Squires is held at the birthplace of the Order.

INSURANCE: The Order offers a portfolio of top-quality insurance and annuity products exclusively for members and their families.

FAMILY FRATERNAL BENEFIT: This benefit for eligible families:

- a) Pays \$1,500 for the child who dies before the age of 61 days;
- b) Pays \$750 for the child who is stillborn at least 20 weeks after conception;
- c) Offers guaranteed-issue insurance up to \$5,000 to any child under age 18.

ORPHAN BENEFIT: Provides an \$80 monthly allotment for orphans of eligible members; up to \$7,000 in college scholarships available.

MEMBER/SPOUSE FRATERNAL BENEFIT: This benefit provides accidental death coverage for eligible members and spouses at no cost.

NEW MEMBER INSURANCE PLAN: Offers a one-time low-cost whole life policy to new members and their spouses.

WIDOW BENEFITS: A member's widow: a) Continues to be covered under the Member/Spouse Fraternal Benefit; b) May purchase insurance or annuities up to one year after an insured member's death; c) Receives a free lifetime subscription to Columbia; d) Remains eligible with her children for scholarships.

SCHOLARSHIPS: Six different college scholarship programs for members and their families; three different graduate fellowship programs and scholarship programs for seminarians are offered.

MATTHEWS AND SWIFT EDUCATIONAL TRUST FUND: This fund provides scholarship benefits for the children of members killed or permanently disabled as a result of military conflict or as a result of criminal violence while lawfully performing their duties as full-time police/fire personnel.

LEADERSHIP DEVELOPMENT: Membership in the K of C offers the opportunity to build personal leadership skills through active involvement in the Order's unique structure, supported by Knightline/Program Supplement: fraternal newsletters mailed to state and local council officers and chairmen.

FOURTH DEGREE: Every Third Degree Knight has the opportunity to join the Patriotic Degree, one year after initiation into the Order.

HONORARY LIFE MEMBERSHIP AT AGE 70: After 25 years of continuous service, at the age of 70, a member merits the distinction of honorary life membership and no longer needs to pay dues.

CATHOLIC INFORMATION SERVICE: The Catholic Information Service provides the opportunity for members and their families to avail themselves of a variety of literature on Catholic faith and spirituality.

MEMBERSHIP CARD: Possession of the Membership Card entitles members to participate in all Catholic, fraternal and social activities in his council and also in councils throughout the world.

FAMILY ACTIVITIES: Membership makes a man and his family eligible for recognition in the Orderwide "Family of the Month/Year" program and participation in a wide variety of local family events, such as family Communion breakfasts and Knights of Columbus Family Week activities in August.

ATHLETIC PROGRAMS: Members can participate in annual council, state and international golf, bowling and softball tournaments, as well as the sports teams sponsored by many councils.

YOUTH PROGRAMS: The children of members and other young people have the chance to participate in a variety of youth-oriented programs such as the Columbian Squires, a leadership training program for young Catholic men under council sponsorship.

BILLING PROCEDURES

A vitally important part of the financial welfare of the council is the collection of dues and per capita assessments from members. The grand knight and the trustees should, therefore, be certain always that:

1. The financial secretary mails the membership bill "First Notice" (#423) 15 days before the billing period to each member. If using the Financial Secretary Personal Computer (FSPC for Windows) software, the financial secretary will assess dues (Procedures/Process Member Dues) and print First Notice Bills (Output/Reports, Labels, Letters/Notices).
2. If payment is not received in 30 days, the financial secretary will mail the membership bill "Second Notice" (#424). FSPC for Windows users will update the billing status (Procedures/Update Billing Status) from First Notice to Second Notice and print Second Notice Bills (Output/Reports, Labels, Letters/Notices).
3. If payment is not received within 30 days from the date the second notice was sent, the financial secretary will provide the names, addresses, telephone numbers, and amounts due for each member in arrears to the retention committee. The committee should include but is not limited to the grand knight, chairman ex officio; the trustees; financial secretary; treasurer; and proposer, if available. Financial secretaries utilizing the FSPC for Windows program will produce the Retention Committee Report (Output/Reports, Labels, Letters/Fraternal) and distribute copies to members of the committee.

The financial secretary forwards a "Knight Alert" letter (#KA1) to each delinquent member, signed by the grand knight and trustees. If using FSPC for Windows, the financial secretary must update the billing status from Second Notice to Knight Alert (Procedures/Update Billing Status) and print the Knight Alert letter (Output/Reports, Labels, Letters/Notices).

The grand knight will assign a member of the retention committee to telephone the delinquent member to remind him of his obligation. The committee member provides a written report of his findings to the grand knight. If the member is experiencing financial difficulty, the grand knight directs two committee members to visit the member and make arrangements to accommodate him with a payment plan or other financial arrangement acceptable to the council. Again, a full report is provided to the grand knight as to why the member is delinquent and is considering leaving the Order. Financial difficulty is not a valid reason for suspension. In FSPC for Windows, the date the retention committee contacted the delinquent member is to be entered on the ledger screen in the retention committee contact field (Edit/Members/Ledger).

4. If at the end of the second month of arrearage the member still has not paid his dues, the "Notice of Intent to Suspend" (#1845) is to be prepared and signed by the financial secretary, countersigned by the grand knight. Those using FSPC for Windows must update the billing status (Procedures/Update Billing Status) and print four copies of the notice (Output/Reports, Labels, Letters/Notices).
 - a. The "Original Copy" is sent to the delinquent member.
 - b. The "Supreme Office Copy" is forwarded to the Department of Membership Records. The supreme knight then mails a personal letter to the delinquent member to convey the supreme knight's interest in having the member retain his "good standing" status.
 - c. The "State Council Copy" is mailed to the state deputy. He will write to the member, offering assistance and advising him that the district deputy in his area is available to help with any particular problems.
 - d. The "District Deputy Copy" is sent to the district deputy. He telephones the delinquent member to discuss the nonpayment situation. In the course of the telephone visit, suggestions as to a possible solution should be recommended, and the district deputy will

volunteer to assist the member, if the need exists. The district deputy determines whether personal contact has been made by the council. The response and reaction received from the delinquent member is recorded on the reverse side of the "District Deputy Copy" of the Form #1845 and then forwarded as soon as possible to the state deputy for review.

- e. The "Council Copy" is retained for council files.

NOTE: FSPC users will forward a copy of the Notice of Intent to Suspend to the (1) member, (2) Supreme Council office, (3) state deputy and (4) district deputy. It is not necessary to retain a printed copy for the council records since the member's status is stored in the database.

5. If the delinquent member does not meet his obligation or arrange a satisfactory payment schedule within 60 days following processing of the Form #1845, the council may file a Membership Document (#100), indicating suspension. However, the Supreme Council office will not process the suspension unless a "Notice of Intent to Suspend" (#1845) has been on file for the required 60 days. After the Form 100 has been filed with the Supreme Council office, FSPC for Windows users must change the member type code to SUSPENDED - NONPAYMENT (Edit/Members/General) and delete any outstanding charges that appear on the ledger screen (Edit/Members/Ledger/Void). A record of the arrearage can be stored in the ledger notes field for future reference.
6. The "Notice of Intent to Suspend" (#1845) becomes null and void 90 days following the date it is recorded at the Supreme Council office. After the 90-day period has elapsed, the form will be removed from the file under the assumption the council has been successful in retaining the member.
7. If, subsequently, the member on whom the council previously filed a "Notice of Intent to Suspend" (#1845) again becomes delinquent, the entire billing/retention process must be reimplemented as described.

Every financial secretary has received clear and concise instructions on this procedure. It is the duty of the district deputy to make certain that they are being carried out by the financial secretary of each council in his district.

COLLEGE COUNCILS

The district deputy can help college students and college Knights build a brighter tomorrow through the opportunities available in the Knights of Columbus by developing a college council in his district. Every college or university, particularly the Catholic ones should be treated as a site for a potential new college council.

College councils require the close involvement of the district deputy. Often, college members are learning the workings and operations of the council. This, coupled with an academic schedule and other commitments required in a campus-oriented lifestyle, makes continued communication and supervision essential to the effectiveness of all college council activities. Furthermore, every opportunity to solicit the support of faculty, administrators and clergy should be pursued so as to provide added community guidance from one academic year to another.

Due to the transient nature of college councils, it is imperative that every effort is made to transfer the graduates. The Graduating Senior Program of the Supreme Council has been redesigned to better assist the college senior to transfer his membership to a local council. The program is designed to accomplish two things: first, for each graduating college council member to replace himself in the college council with an underclassman thus maintaining an active membership in the college council.

Second, to transfer his membership to a local council upon graduation. District deputies are encouraged to take an active role in this process making sure that the transfer process of the graduating seniors is initiated early in his final semester so as to avoid a rush before graduation. Find out where the senior will be residing after graduation and make an effort to contact the council in that area. For this, seek the

help of the state council or Supreme Council as necessary. When successfully transferred, the youth and enthusiasm of the college council graduate can rekindle the vitality of his new local council infusing it with new and fresh ideas. Graduating Senior Program is one the most important aspects of maintaining a good college council. You are again encouraged to take a proactive role in this process making sure that a contact is made with the graduating seniors in your area.

For more information on the Order's college council program, or on the development of a council at a college or university, contact the Department of Council Growth and Development at (203) 752-4404.

DUTIES OF OFFICERS AND DIRECTORS

GRAND KNIGHT - The grand knight is the chief executive officer of his council. The grand knight must determine and carry out a program of activities that will hold the interest and stimulate the enthusiasm of the members. To do this he appoints a program director and directors for Church, community, council, family and youth activities at the start of the new program year. The grand knight must ensure that the council continues to grow through active membership recruitment activities. To do this he appoints a membership director and committee.

If any officers of the council are not performing their duties, the grand knight is obligated to take action to remedy the situation by reporting the matter to the district deputy or higher authorities.

He should observe carefully the amount of collections reported by the financial secretary at each meeting and which he turned over to the treasurer, as required by subdivision 3 of Section 139 of the "Charter, Constitution and Laws." This enables him to know whether the collections reported at each meeting correspond with the amount that should be collected. If they are less than they should be, it is the grand

knight's duty to take steps to have the collections made and recorded, with a report submitted to the district deputy, the state deputy and the supreme knight.

The grand knight must carry out the "Order of Business" set forth in Section 125, with emphasis on his reading at each council meeting the treasurer's receipt to the financial secretary for all moneys received at the close of the previous meeting and the treasurer's voucher of deposit, showing that the money was deposited in the bank. This establishes the amount being collected and enables the grand knight to know whether it is all that should be collected.

It is the responsibility of the grand knight to see to it that a council First Degree team is organized and functions according to regulations set forth. All parts must be committed to memory. Reading is strictly prohibited. The grand knight is in charge of the First Degree. The First Degree is to be exemplified at a regular business meeting at the proper time prescribed. (see the First Degree Ceremonial)

It is his responsibility to ensure that in accordance with Section 164 of the "Charter, Constitution and Laws," no members shall be suspended for failure to pay council dues unless he has been personally contacted by an officer of the council or a member of the retention committee in an effort to persuade him to retain his membership. A conscientious fulfillment of that obligation can dramatically reduce the suspensions. Additionally, all members in good standing in insurance territories are eligible for the Order's program of family, orphan and member/spouse fraternal benefits provided the members' councils are also in good standing. This should also provide incentive for members (and councils) to maintain their active status and avoid suspension.

For details on the grand knight's duties see the Grand Knight's Handbook (#915).

FINANCIAL SECRETARY - The financial secretary is the collector and record keeper for the council. The good standing

of the members depends upon his fulfilling this duty. For this purpose, the financial secretary must strictly follow the billing and 1845 procedures (see 1845 PROCEDURES in this section).

The financial secretary should encourage the members to pay their council dues and per capita assessments on an annual basis in advance.

The financial secretary enters all payments received by him immediately upon their receipt and then makes a corresponding entry in the members' individual records. He must maintain such hours as will enable the members to conveniently contact him to make their payments, either in his home or in the office of the council chamber. He should cooperate with the insurance representative in the fullest measure.

The financial secretary should promote the insurance feature in every manner possible, including the encouragement of applicants for membership and associate members to take insurance in the Order, and by encouraging insurance members to take additional insurance. It is his duty to report promptly the death of any member. As additional compensation for the various services he renders, he will receive forty cents for each insurance certificate that is in good standing and recorded in his council at the end of each year.

The financial secretary is appointed by the supreme knight for a period of three years upon recommendation of the grand knight and trustees of the council. Following the completion of three years, his performance in the office is evaluated by the grand knight, trustees and the district deputy who determine if the financial secretary is recommended or not recommended for reappointment. The complete evaluation is forwarded to the state deputy for his signature and transmittal to the supreme knight.

When a financial secretary wishes to retire from his office, he sends a brief statement of resignation to the supreme knight. Upon receipt of the letter at the Supreme Council office, the appropriate forms for the nomination and appointment of the new financial secretary are forwarded to the grand knight.

For details on the financial secretary's duties see the Financial Secretary's Handbook (#1410).

COUNCIL TREASURER - The council treasurer must be careful and accurate in keeping a record of receipts and expenditures. He receives from the financial secretary at the close of each meeting all the moneys received by that officer since the close of the previous meeting and gives his receipt. He immediately deposits the moneys received in a depository selected for that purpose and obtains a voucher. He then delivers this voucher to the grand knight to be read at the next meeting of the council.

PROGRAM DIRECTOR - The program director is responsible for overseeing the implementation of the Church, community, council, family and youth related activities of the council. He recommends respective activity directors to the grand knight, who appoints them to assist in the development of all programming activities. He must be knowledgeable about the entire Service Program concept. His objective is to provide a comprehensive, balanced program of activities based upon the council members' interests. Administration, delegation and direction are key responsibilities of the program director.

MEMBERSHIP DIRECTOR - The membership director is responsible for all council recruitment, retention and insurance promotion activities. He acts as recruitment chairman, overseeing the membership committee, and trains recruiters on proper techniques and implementation of the current membership campaign. The membership director must work closely with the grand knight, financial secretary and the program director to establish an organized membership program to guarantee the continued growth and strength of the council.

FINANCIAL MATTERS

KEEPING ACCOUNTS - The district deputy should make certain that the *Charter, Constitution and Laws*, which spells out how council moneys shall be handled by the financial secretary and treasurer of each council under his supervision, are fully observed. The *Charter, Constitution and Laws* state that all moneys that come to a council from any source

shall be received by the financial secretary. He delivers these moneys to the treasurer at the end of each council meeting. The treasurer gives the receipt to the financial secretary that must then be given to the grand knight, who reads it at the next council meeting.

Following each meeting of the council, the treasurer deposits the moneys received from the financial secretary to the credit of the council in a bank approved by the trustees. He must furnish a certificate of such deposit to the grand knight, also for reading at the next council meeting. The amounts of these two items must be identical, i.e., the amount of money turned over to the treasurer by the financial secretary and the amount which the bank certificate shows the treasurer deposited to the credit of the council. The receipt and certificate must both be read by the grand knight at the next council meeting. The grand knight and the council are thus kept informed on the fact that all moneys received by the financial secretary have been delivered to the treasurer of the council and have been properly deposited by him to its credit.

Under no circumstances is the financial secretary permitted to deposit the money in the bank or to perform any other duty of the treasurer. The two officers are intended to be a check against each other, and therefore, neither officer is permitted by law to perform any of the duties of the other.

PER CAPITA TAXES - All moneys collected by a council for Supreme Council per capita taxes, whether they are included in a council's dues or charged as separate items, are the properties of the Supreme Council and may not be used by the council for any purpose other than transmittal to the Supreme Council office. The same is true of a state council per capita tax, whether the tax is included in the council's dues or charged as a separate item. The tax is the property of the state council and may not properly or legally be used by the subordinate council for any purpose other than transmittal to the state council. To use these moneys to meet a mortgage payment, to meet local bills of one kind or another, to provide entertainment, or to apply them to other such

purposes is not only illegal, but is a gross injustice to the members.

The *Charter, Constitution and Laws* specifies the time within which a council must meet its obligations to the Supreme Council - 100 days from the date on which a particular per capita charge is made. The per capita tax levied on Jan. 1, becomes finally due and payable on April 10. Section 156 of the *Charter, Constitution and Laws* provides that when a council fails to meet a Supreme Council charge within the time specified, it becomes automatically suspended. When this happens, the supreme secretary sends a notice of such suspension to the council and a copy to the district deputy, and the state deputy. Upon receiving the notice, the district deputy should communicate with the council and see that it makes immediate payment of whatever amount caused the suspension. In addition, the district deputy should make the council aware that failure to resolve the suspension could result in the council's members losing eligibility for Member/Spouse, Family and Orphan fraternal benefits, as well as other benefits of membership.

There are always reasons for the failure of a council to meet its Supreme Council obligations. It may be due to neglect on the part of the officers to forward payment, it may be due to lack of funds through failure of the financial secretary to give proper attention to the matter of collection from members, and it may be, as already stated, the diversion to other purposes of moneys that properly should be forwarded to the Supreme Council office. A separate account for Supreme Council and State Council per capita assessment is one way of assuring prompt payment of these accounts. When working on the case of a suspended council, the district deputy should determine for himself the reason that brought about this suspension and then prescribe whatever remedy is necessary to correct the situation.

ANNUAL DUES - To promote the idea of annual payment of dues by members, the district deputy should bring to the attention of the financial secretary the availability of the "Annual Payer" gummed labels for the membership cards. The labels are supplied on a special sheet which contains

135 individual stickers. This is an excellent form of recognition for members who pay their dues annually. The entire sheet sells for \$1.25 and must be ordered through the Supreme Council Supply Department. Orders will be accepted only from the council's grand knight or financial secretary. Orders should specify: Annual Payer Sticker (#1745).

FINANCIAL SECRETARY PERSONAL COMPUTER (FSPC) SOFTWARE

The Supreme Council office has available the Financial Secretary Personal Computer (FSPC) program to help the financial secretary with his clerical duties. This is an opportunity for the financial secretary to save valuable time performing routine tasks such as billing members, recording payment of dues and preparing membership cards for the council. This program is a great way to keep track of the council's history and the members who created it.

PC hardware requirements are listed below:

- 100% IBM Compatible Computer - with Pentium Processor (Pentium - 100 or higher recommended) (Note: No Apple/MAC version is available now or is planned for the future.)
- Windows®95, Windows®98, ME, or XP Operating System
- 3.5" - DS/DD 1.44MB disk drive
- CD-ROM Drive
- 16 MB or more of RAM
- Minimum of 20 MB of available hard disk space
- Microsoft or compatible mouse
- SVGA Color monitor
- Printer (Windows capable laser, inkjet, or dot-matrix inkjet or laser recommended)
- Modem & Internet Connection recommended

Ordering information is contained in the Supply Catalog (#1264) or is available by contacting the Supreme Council Supply Department.

MEMBERSHIP PROCEDURES

In an effort to provide the district deputy with as much knowledge as possible, membership procedures are explained below. District deputies should become familiar with these procedures and be always ready to answer the many questions which arise concerning these transactions.

NEW MEMBERS - Send a Membership Document (#100) for each new member to the Supreme Council office within 24 hours of his First Degree. The First Degree establishes membership, and the Form #100 must be recorded by the Supreme Council office so that the new Knight can promptly receive full benefits of membership. All candidates and their wives must accept or decline the New Member Insurance plan offer in Section 5 on the front of the Form #100. If the husband and wife decline the insurance offer, send the original copy of the Form #100 to the Supreme Council office. Send the duplicate to the general insurance agent, and keep the third copy for council records.

If the candidate accepts the insurance offer, he completes the reverse side of the Original copy of Form #100. If the candidate's wife accepts the insurance offer, she completes the reverse side of the Duplicate copy. The financial secretary collects from the candidate or the proposer \$50 for annual premium or \$25 for semiannual premium on each proposed insured. The financial secretary retains all copies of the Form #100 and premium payments until the candidate receives his First Degree.

Immediately following the First Degree, the financial secretary forwards the original and duplicate copies of the Form #100, premium payments and copies of Transmittal Form (#175FS) to the general agent. This transaction is credited as an addition toward Supreme Council Award quotas.

JUVENILE TO ADULT - An applicant with an in-force insurance policy issued when he was under age 18 should be processed through a juvenile-to-adult transaction. Although the procedures for new members listed above apply, juvenile-to-adult transactions are a specific category of new-member transaction. If the prospect applies for membership before his 19th birthday, the

maximum initiation fee is \$5. The juvenile to adult transaction qualifies as both an associate and insurance member addition for awards purposes. This transaction is credited as an addition toward Supreme Council Award quotas.

REINSTATEMENT - Reinstatement is used only when a former member has been terminated for three months or less and only if his suspension or withdrawal was issued by the council. The applicant must pay arrearages to the financial secretary of the council he was suspended from. The financial secretary must notify the Supreme Council office of the reinstatement with a Form #100. A reinstatement will not reflect a break in membership and no council action is required. This transaction is credited as an addition toward Supreme Council Award quotas.

READMISSION - Readmissions are used when a membership termination exceeds three months and up to seven years. The applicant may be readmitted to the council of his choice. Council action on his membership is required, but action by the Admission Committee is normally not needed.

If the applicant left his former council by withdrawal before October 1, 2003, he simply attaches the withdrawal card to his Form #100 and pays only future dues. If the applicant was suspended for non-payment or he left by withdrawal on or after October 1, 2003, he must pay \$7.50 in place of all arrearages. The financial secretary forwards only the Form #100 to the Supreme Council office, and processes the \$7.50 into a council account. The Supreme Council office charges the receiving council \$7.50 and credits the former council \$7.50.

If a member seeks readmission to his former council, he pays \$7.50 or the amount of his arrearage, whichever is less. Years of membership before suspension or withdrawal, unless 25 consecutive years of membership required were already accrued, do not count toward honorary or honorary life membership. This transaction is credited as an addition toward Supreme Council Award quotas.

REACTIVATION - Reactivation pertains to inactive insurance members. By law an inactive insurance member can reacti-

vate his membership for \$5. No fee is required if he left the Order by withdrawal before October 1, 2003. Years of membership before suspension or withdrawal, unless 25 consecutive years of membership required were already accrued, do not count toward honorary or honorary life membership. This transaction is credited as an addition toward Supreme Council Award quotas.

REAPPLICATION - When an applicant has been suspended for more than seven years the reapplication process is used. He may reapply to the council of his choice, paying the \$7.50 re-entry fee that is kept by the new council. The applicant need not retake his degrees if he satisfies the Admission Committee that he has already done so. If the applicant left by withdrawal before October 1, 2003, he simply attaches the withdrawal card to his Form 100 and pays only future dues. Years of membership before suspension or withdrawal, unless the 25 years of consecutive membership required were already accrued, do not count toward honorary or honorary life membership. This transaction is credited as an addition toward Supreme Council Award quotas.

TRANSFER - A Knight with a current membership card may transfer to any council by completing a Form #100. The receiving council accepts the application under elective procedures. The transfer is initiated only by the receiving council. Members cannot be transferred out of a council. It is suggested that the financial secretary of the receiving council estimate any arrearages the applicant may owe his former council and collect that amount (if any) along with advance dues. Adjustment to dues will be made through the council's monthly billing statement.

Upon receipt of the transfer application, the Supreme Council office immediately transfers the applicant to the new council and advises the former council of the effective date on the Account Adjustment for Transfer Form (#142) (dues adjustment) in triplicate.

The financial secretary of the former council enters degree information, annual dues, date to which the dues were paid, and the credit or past due balance. Following completion,

the appropriate copy is retained for council files and the remaining two copies returned to the Supreme Council office. If using Financial Secretary Personal Computer (FSPC) software, the financial secretary should change the member type code on the general screen to TRANSFER OUT and adjust the financial balance on the member's ledger to zero.

Upon receipt of the completed Form #142, the Supreme Council office will charge or credit the former council and enter an offsetting charge or credit to the receiving council. The new council copy of the Form #142 is then mailed to the financial secretary of the receiving council. He will adjust the account of the transferee and record degree dates and other membership information on the ledger card. This transaction is not counted toward or against Supreme Council Award quotas.

WITHDRAWAL - The withdrawal transaction cannot be reported by using the Form 100 Membership Document. Rather, a personal signed communication from the member requesting withdrawal (resignation) is required to be sent to the council or assembly and forwarded to the Supreme Council office. In good standing financially is not a consideration. A member can resign whether he is current in dues or in arrears. The only stipulation is that he must be eligible for re-entry as of the date he files his letter of withdrawal with the council or assembly. Withdrawal is not an option for a felon, non-practical Catholic, or someone who has been suspended or expelled under Section 162 of the Order's Laws. Those members who apply for and are granted a withdrawal do not maintain continuous membership. The membership record will reflect a break in service.

If the applicant for a withdrawal card is an insurance member, he will be recorded as an inactive member and will remain in that status on the council roster as long as his insurance is in force. The council continues to be responsible for Supreme and state council assessments on inactive members. However, a \$9 credit is applied to the council's account the month following the anniversary date of the member's insurance policy to offset such assessments.

FSPC users must change the member type code on the general screen to withdrawal, and the ledger must show a zero balance.

The transaction is charged as a loss against Supreme Council Award quotas.

SUSPENSION-NONPAYMENT - Suspension for non-payment represents the largest group of losses to our Order each year. Thus, it is of vital importance that proper billing procedures be followed before active membership is terminated by suspension. Please refer to billing procedures on pages 42-45.

A suspended insurance member goes to an inactive member status and remains on the council rolls. Because of this fact a council is responsible for the Supreme and state council assessments but receives the annual \$9 credit as explained in the preceding section.

FSPC users must change the member type code on the general screen to SUSPENDED-NON-PAYMENT and delete any outstanding balance from the ledger screen. A record of the arrearage can be stored in the ledger notes for future reference.

The transaction is charged as a loss against Supreme Council Award quotas.

DEATH - As soon as possible after the death of a council member, a Form #100 is to be completed and submitted to the Supreme Council office for processing. It is imperative that the complete date of death - month, day and year - and survivor information be included on the Form #100. FSPC users need to change the member type code to DECEASED and delete outstanding charges, if applicable. Death notices received at the Supreme Council office within six months of the date of death enable the supreme knight to write to the survivor, expressing condolences on the death of the member. Notices received in excess of six months following the actual date of death are not considered timely; the supreme knight's condolence letter is not sent in these instances. This transaction is not counted against Supreme Council Award quotas.

DISABILITY-RELIEF FROM PAYMENT - Knights who are unable to engage in any occupation for a period of at least six months may apply for a waiver of dues under Section 118(e) of the Order's laws. Evidence of total disability must be furnished to the Supreme Council office, along with the Application for Relief From Payment of Council Dues and Supreme and State Council Per Capita Charges form (#1831). The Form #1831 must be signed by the disabled member, the grand knight and the financial secretary. For each member on disability, the financial secretary using FSPC must select from class codes of DISABLED or DISABLED HONORARY, as appropriate. All disability waivers expire on Dec. 31 of each year and must be renewed during the 90 days prior to expiration. A letter is sent from the Supreme Council office requesting confirmation of continued disability during October and must be signed by the grand knight and the financial secretary.

Council members who are exempt from dues payment under Section 118(e) are to be issued a membership card (#154) on a calendar year basis. In the case of a member qualified for exemption under both Sections 118(e) and 118(d) - honorary life - the honorary life designation takes precedent. Should a member of your council on disability exemption qualify for honorary life, a Form #100 should be submitted requesting the latter classification.

Specific guidelines pertaining to application for and renewal of relief under Section 118(e) appear in the Financial Secretary Handbook.

ADDITIONAL PROCEDURES - Procedures for additional membership transactions - honorary/honorary life; data changes; suspension for non-practical Catholicity, felony conviction and misconduct - can be found in Section D of the Financial Secretary Handbook.

SERVICE PROGRAM/MEMBERSHIP REPORT FORMS

Each fraternal year councils are asked to file reports in regards to the Service Program and membership. They include:

ANNUAL SURVEY OF FRATERNAL ACTIVITY (#1728) -

The Annual Survey of Fraternal Activity (#1728) is due Jan. 31 at the Supreme Council office. This form is found in the Council Report Forms Booklet (#1436) and the Columbian Squires Circle Report Forms Booklet (#401) and on the Order's Web site. It should be completed by the grand knight and financial secretary, or the chief squire and chief counselor. The information obtained from the Fraternal Survey is essential for documenting the Order's record of charitable and fraternal activity, and helping to maintain the tax-exempt status. To collect data, councils, assemblies and circles can photocopy the Survey of Fraternal Activity Individual Member Worksheet (#1728A) and distribute it to members. This form is found in the Council Report Forms Booklet (#1436) and the Columbian Squires Circle Report Forms Booklet (#401) and on the Order's Web site.

REPORT OF OFFICERS CHOSEN FOR THE TERM (#185) -

Immediately following elections, the financial secretary should file a Report of Officers Chosen for the Term (#185) with the supreme secretary, with copies to the state deputy, district deputy and council files. The report form, due on July 1, is found in the Council Report Forms Booklet (#1436) and on the Order's Web site. The information from this form allows the state council and the Supreme Council office to compile mailing lists of council officers.

SERVICE PROGRAM PERSONNEL REPORT (#365) -

One of the grand knight's first duties is to appoint chairmen and directors for the areas of service, membership, pro-life, insurance promotion and other programs. It's up to the grand knight to report his appointments to the Supreme Council Department of Fraternal Services using the Service Program Personnel Report (#365) by Aug. 1. This report is located in the Council Report Forms Booklet (#1436) and on the Order's Web site. Completed copies of the report also go to the state council, district deputy and council files. The information from this form allows the state council and the Supreme Council office to compile mailing lists of council directors and chairmen.

COLUMBIAN AWARD APPLICATION (#SP-7) - The Columbian Award Application (#SP-7) must be submitted to the Supreme Council office by June 30. It is located in the Council Report Forms Booklet (#1436) and on the Order's Web site. It should be completed by the grand knight or program director. Submission of the Columbian Award application is essential to qualify for the Star Council Award. Each fraternal year the Order recognizes council achievements in membership recruitment and retention, service programming and promotion of the insurance program through the Father McGivney, Columbian, Founders' and Star Council awards. The Surge...with Service manual (#962) includes a listing of the requirements for these awards. The Supreme Council office automatically determines the winners of the Father McGivney Award and Founders' Award. Councils that meet all the requirements of the above-mentioned awards qualify for the Star Council Award.

COUNCIL STATEMENT (#1154) - All financial and membership transactions, as well as address maintenance, processed for each council are on the Council Statement. The Council Statement contains a "Summary and Payment Coupon" and a "Council Statement" page. The Summary and Payment Coupon page provides a summary information on membership and financial information, and also informs the financial secretary of the status of the council at the Supreme Council (i.e.: in good standing, pending suspension, etc.). The Council Statement page contains the beginning and ending balances for the month along with any financial transactions that occurred that month. It may also contain information on members' address changes. The report is mailed to each financial secretary of record on a monthly basis. Because of the importance of this information the financial secretary should retain these reports for at least 12 months as reference for any membership/financial questions that may arise and for the Council Semiannual Audit.

GRAND KNIGHT'S MEMBERSHIP & FINANCIAL STATEMENT (#1189) - The grand knight of record receives a modified version of the Council Statement each month. The Membership & Financial Statement (#1189) details monthly

and year-to-date award statistics, council membership figures by category, accounting information of the council's financial activity relative to Supreme Council office accounts, and the status of the council on the records of the Supreme Council.

COUNCIL MEMBERSHIP STATEMENT (#MDCMS) - The membership director of record receives a modified version of the "Council Statement" (#1154) each month. The Membership Director Council Membership Statement (#MDCMS) details monthly and year-to-date award statistics and council membership figures by category.

SPANISH SPEAKING COUNCILS

Many areas of the United States and Canada are experiencing growth of the Spanish speaking Catholic community. Following the Church's lead, the Knights of Columbus is reaching out to the Spanish speaking Catholic families to invite them to become an active part of the Order. As part of this effort, the Supreme Council office offers Spanish versions of all recruiting materials needed for a successful membership drive in the Spanish speaking Catholic community.

The Supreme Council office recommends that a council initially make every effort to recruit parishioners who are bilingual, who in turn will be the liaison between the council and the Spanish speaking Catholics. Then, with the help of these bilingual members, Spanish speaking Catholics - who do not manage the English language well enough to participate actively in council meetings - can be recruited to form a Spanish speaking K of C Round Table or to institute a new Spanish speaking council.

For more information on Spanish speaking councils contact the Department of Council Growth at (203) 752-4426.

CONCLUSION

This handbook has been developed to provide information and guidance concerning the role of the district deputy. It does not anticipate every specific expectation within the scope of his job. It is hoped, however, that by addressing some of the more important aspects related to his duties, it will be of help, especially to a new district deputy. It is recognized that there will be issues and areas not covered here. In those cases the handling and resolution will call for the judgement, discretion and experience of the district deputy. Help is available from the state deputy, state officers, various activity chairman and the staff in the Supreme Office. These resources are all available to supplement this reference tool in providing assistance and guidance.

This handbook will greatly benefit all who seriously apply its message. To those who do, they will contribute significantly to the growth of the Order in their district which will bring satisfaction at the end of their term, knowing they have assisted their councils in service to the Church, community and their fellow man.



Charles H. Foos
Supreme Secretary

New Haven, Conn.

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| INDEX |
|--------------|

| | |
|--|-------------------------|
| Admission Committee | 22-23, 37-39, 54-55 |
| Administrative Responsibilities | 4 |
| Application for membership and admission committee | 37 59 |
| Appointments | 7,11,49-50 |
| Assessments, Per Capita | 7,42,48,50-51,58 |
| Audiovisual Library | 33 |
| Audit, Semiannual | 15-17,23,60 |
| Awards | 2,29,34,3,60 |
| Awards Presentations | 8 |
| Benefits of membership | 2,29,30,39-41 |
| Benefits of serving as a district deputy | 2 |
| Billing Procedures | 5,23,24,42,57 |
| Bonding | 16 |
| Ceremonials | 9-15 |
| Dress | 11 |
| Paraphernalia | 10 |
| Collection of funds | 5 |
| College Councils | 45 |
| Columbian Squires | 20,31,41,59 |
| Council Meeting | 15,17 |
| Council Officers Jewels | 9-10,11,15 |
| Council Retention | 25 |
| Council Reactivation | 26 |
| Council Visits and Visitation Remarks | 18,21 |
| Death | 30,40,48,57 |
| Degree | 4, 9-15, 23, 39, 47, 53 |
| Disability Waiver | 7, 58 |
| Dissolution of Council | 9 |
| Dissolved councils | 9 |
| District Organizational Meeting | 16 |
| District Membership Report | 8,26 |
| District Mid-year Meeting | 17 |
| Degree Paraphernalia | 10 |
| District Deputy | |
| Appointments | 2 |
| Duties | 4,8,54 |

| | |
|---|--|
| Materials | 4,5,9,34,35 |
| Robe | 4 |
| District Meetings | 15-18 |
| District Meeting Outline | 19 |
| Dress | 11 |
| Duties of District Deputy | 4,8,54 |
| Duties of Financial Secretary | 7,15-18,31,42-43,47-49,50,52-54 |
| Duties of Grand Knight | 5,7,11,13,15,16,30,31,35,37-39,43,46-47,58-59,60 |
| Duties of Membership Director | 49 |
| Duties of Officers and Directors | 46-49 |
| Duties of Program Director | 49 |
| Duties of Treasurer | 48 |
| Expenses | 8 |
| Financial Matters | 15, 49 |
| Financial Responsibilities | 15 |
| Financial Secretary | 34-39, 42-43, 46-51, 58-60 |
| Financial Secretary Personal Computer (FSPC) Software | 52 |
| Fraternal Benefits | 28-30, 47, 51 |
| Free Throw Championship | 33 |
| Grand Knight | 5,7,11,13,15,16,30,31,35,37-39,43,46-47,58-59,60 |
| Informational Resources | 8 |
| Installation of officers | 4,9 |
| Insurance | ,20,26,27,29,30,40,47-48,, 53 |
| Insurance Promotion | 20,26-27, 29 |
| Jewels | 4,9,10,15 |
| Juvenile to Adult | 53 |
| Per Capita Assessment | 7,42,48 |
| Properly Kept Books | 20 |
| Semiannual Audit | 16 |
| Meetings | 16 |
| Membership | 16 |
| Admission Committee | |
| Balloting | 22, 37-39, 54-55 |
| Benefits | 38-39 |

| | |
|------------------------------------|-------------------|
| Growth Responsibilities | 29 |
| Procedures | 20,49 |
| Transactions | 20,49,52-58 |
| Membership Director | 52-58 |
| New Council Development | 17-18, 28, 46, 49 |
| New Council Development Award | 8,9,17,24-25,27 |
| New Member Insurance Plan | 34 |
| New Member Transaction | 26,29,40 |
| "Notice of Intent to Suspend" | 53 |
| Officer, Failure to Perform Duties | 5,24,44 |
| Ordering Materials | 7 |
| Organizational chart | 35 |
| Paraphernalia | 3 |
| Per Capita Taxes | 10,13 |
| Program Director | 50 |
| Reactivation Transaction | 18,46,49,59 |
| Readmission Transaction | 54 |
| Reapplication Transaction | 54 |
| Recruitment | 39, 55 |
| | 17,20,23,27,32, |
| Reference Guide | 33,35,47,49,60 |
| Registration | 37 |
| Reinstatement Transaction | 13-15 |
| Report of council status | 53-54 |
| Report Forms | 5,6,20,32 |
| Retention | 16,25,31,58,59 |
| | 2,7,17,20,23-25, |
| Role of the District Deputy | 43,44,47,49,60 |
| Rules relating to expense account | 2 |
| Sample District Meeting Outline | 5,8 |
| Semiannual audit | 19 |
| Service Program | 16-16,60 |
| | 2, 5, 18, 20-21, |
| Spanish Speaking Councils | 30-31, 49, 58-60 |
| Star District Award | 61 |
| Strategy Sessions | 27, 34 |
| Supplies | 17-19 |
| "Surge...with Service" | 35 |
| Suspension Transaction | 5,8,30-34 |
| | 5, 8, 42-44 |
| Team Member responsibilities | |
| Transfer Transaction | 11 |

| | |
|----------------------------|-------------|
| Travel outside of district | 25,45,55 |
| Trustees | 7 |
| Videotapes | 16,42,49,50 |
| Visitation | 33,35 |
| Withdrawal Transaction | 18, 21 |
| | 53,54-55,56 |

Supreme Council Office Personnel

- CASH LOANS AND SURRENDERS: See Certificate Service
- CATHOLIC INFORMATION SERVICE: Rev. Gabriel O'Donnell, O.P., Director
- CAUSE FOR FR. MCGIVNEY: Rev. Gabriel O'Donnell, O.P., Postulator
- CEREMONIALS: Gary R. Nolan, Director
- CERTIFICATE SERVICE: Carolyn DiLeo, Director
- COLUMBIA: Tim S. Hickey, Editor
- COLUMBIAN SQUIRES: See Fraternal Services
- COUNCIL ACCOUNTS: See General Office
- COUNCIL GROWTH AND DEVELOPMENT: Louis W. Barbour, Assistant to the Supreme Knight - Council Growth
 Georges M. Haddad, Senior Fraternal Consultant
 Cyril B. Embil, Program Consultant, College Councils
 José G. Moreno, Program Consultant, Spanish Speaking Councils
- FINANCIAL SECRETARY APPOINTMENTS: Robert F. DeFonce, Administrator
- FOURTH DEGREE: Joseph P. Schultz, Supreme Master
- FRATERNAL SERVICES: Robert A. Goossens, Director
 Kevin P. Brady, Sr. Membership Coordinator
 Karen E. Buchanan, Photo Archivist
 Wojciech Dadak, Programs Associate
 Bruce Dougherty, Fraternal Communications Coordinator
 Philip Gaudet, Program Consultant
 Stephen Marshall, Fraternal Communications Associate
 Thomas Milardo, Special Events Associate
 Ann M. Moran, General Programs
 Gary F. Morrissey, Sr. Special Events Coordinator
 William C. O'Brien, Squires Administration
- GENERAL OFFICE: Thomas A. Joaquim, Director
- INSURANCE FIELD MANAGEMENT: Thomas P. Smith, Senior Vice President - Agencies and Marketing
 Michael S. Boullion, Agency Vice President, Central Region
 Robert O'Keefe, Agency Vice President, Eastern Region
 Ralph C. Stanley, Agency Vice President Western Region
 William J. Murray, Vice President, Field Development
 Richard A. Robinson, Agency Vice President, Training and Compliance
- INSURANCE MEMBER BENEFITS: Louise K. Vets, Vice President
- INVESTMENTS: Charles C. Walden, Executive Vice President - Investments
- KNIGHTLINE: See Columbia
- MEDICAL: Michael Conforti, M.D., Medical Director
- MEMBERSHIP RECORDS: Larry W. Mitchell, Director
- MUSEUM: Lawrence D. Sowinski, Director
 Kathryn Cogan, Assistant to the Director
 Mary Lou Cummings, Curator
 Susan Brosnan, Archivist
- NEW INSURANCE BUSINESS: Eleanor Biondo, Director
- PAYMENT RECEIPTS: Linda L. Perry, Director
- PRINTING PLANT AND SUPPLIES: Richard J. Maloney, Manager
- PROGRAM SUPPLEMENT: See Fraternal Services
- SCHOLARSHIPS: Jean A. Graney, Supervisor