

# MEMBERSHIP HANDBOOK



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**“Making it Personal!”**

## TABLE OF CONTENTS

MEMBERSHIP TEAM – Game Plan.....	1
MARYLAND STATE OFFICERS .....	4
SUPREME COUNCIL INSURANCE DIRECTORS .....	5
STATE MEMBERSHIP TEAM	
Director, Chairmen, and Regional Advisors.....	4
District Deputies.....	8
INTRODUCTION.....	9
State Membership – Team Expectations.....	12
Inactive, Insurance & Associate Members .....	13
New Council Development .....	13
FUNCTIONS and RESPONSIBILITIES	
Grand Knight.....	16
Membership Chairman.....	17
Recruitment Chairman .....	17
Admissions Committee .....	18
Advancement Chairman .....	18
Retention Chairman.....	19
Summary.....	19
RECRUITMENT	
Recruiting .....	20
How to conduct a successful membership drive.....	22
RETENTION.....	25
FORMER MEMBERS.....	26
KEEPING YOUR COUNCIL STRONG .....	27
INSURANCE .....	28
Marlowe Agency .....	29
Canter Agency .....	30
Western Maryland .....	31
APPENDICES.....	32



## **MEMBERSHIP TEAM “GAME PLAN”**

### **OUR GOAL AS A TEAM:**

Is to make every council in Maryland Active in Recruitment; To help them to be Successful in their membership goals; and to maintain an acceptable level of Membership Recruitment, so as to cause the Knights of Columbus to become a stronger organization; and to continue the dream of our founder Fr. Michael J. McGivney and to offer EVERY Catholic Male over the age of 18 ***“THE EXPERIENCE OF A LIFETIME”***

### **OUR APPROACH AS A TEAM**

- 1) To visit councils on a regular basis with the purpose of teaching methods of recruitment and retention.
- 2) Pay special attention to all “ZERO NEW MEMBERSHIP” Councils to ascertain what help and or instruction they feel they need to grow their councils.
- 3) Attend Quarterly State Meetings, IE: GK Seminar, Fall, Mid-Term & the Spring meetings.
- 4) Attend Chapter Meetings regularly to be accessible throughout the State.
- 5) We will attend District Meetings when possible. At these meetings we will offer instruction on Membership and Retention along with questioning those present to determine in which areas the most help is needed.
- 6) Impress upon the councils the importance of starting the recruiting process immediately following elections. There are no vacations from recruiting.
- 7) It will be our responsibility to cover recruiting; retention; the promotion of members through degrees; as well as helping problem councils.

### **OUR MISSION AS A TEAM:**

Our mission is to serve Our State, Our Districts and Our Councils.

# Maryland Membership Plan 2014-2016

## Your Success is Our Goal

- 1) Make it personal!
  - a. How would you like to be treated
  - b. How would you like to be communicated with
  - c. A member is not just a dues check. They are the councils history
  - d. Treat everyone with the same respect you would expect.
  - e. Treat each member better than you would expect yourself.
  - f. Your Success is our Goal
- 2) Utilize the ROAR Team ( Retention Outreach And Reactivation Team)
  - a. A group of dedicated knights retired or no longer able to traverse the state but are willing to help.
  - b. Councils will provide lists for these men to call.
  - c. This group will utilize the “inactive” roster as well.
  - d. Feedback to councils will be invaluable.
  - e. Your Success is our Goal
- 3) Regional Advisors, assigned to Districts, in place to help
  - a. Each is assigned to particular councils and districts.
  - b. All are experienced Former District Deputies, Chairman, and Directors..
  - c. All are qualified to assist the councils with any matter that arises.
  - d. The Advisors will keep you up to date on form submission.
  - e. Your Success is our Goal
- 4) State Officers assigned to Districts, Regional advisors, and councils.
  - a. Follow the chain of command to get answers and results
  - b. These men will also be calling on you for progress reports
  - c. We are resources to be utilized.
  - d. Your Success is Our Goal
  - e. Council failure is not an option.
  - f. Your Success is our Goal

- 5) One Member Per Council Per Month, One Star Council Per Council.
  - a. Each council starts as a Star Council, It's theirs to lose. We cannot let that happen!
  - b. Recruitment is 365. Wear the emblem of the Order Proudly ( People are watching)
  - c. Degree schedules planned by District Deputy's, with councils input.
  - d. Team participation from all councils.
  - e. Establish TEAM assistance for drives and all recruitment.
  - f. Utilize ROAR members for interest cards if necessary
  - g. Make sure the Chaplain is on board
  - h. Join Parish Ministry Fairs ( Start One)
  - i. Have councils start their own ROAR committee for outreach.
  - j. Have a membership theme of your own (Personal to you).
  - k. Your Success is our Goal
  
- 6) One Star District Per District.( District Deputy's Role )
  - a. Each District starts out as a Star District, It's yours to lose. We cannot let that happen!
  - b. Treat each council as family "You don't gotta like them, but you gotta love them."
  - c. Assist when asked, or supply assistance from the State Team
  - d. Keep the State informed. You are not out there alone.
  - e. Hold District recruiting events.
  - f. Teach your GK's well "They are not alone", "We are a TEAM".
  - g. Your Success is our Goal.

**We are One TEAM with One Goal**

**Success!**

# MARYLAND STATE OFFICERS

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# STATE MEMBERSHIP TEAM

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## **Districts, District Deputies and Councils**

<b>1 – DD Terry Waters</b>	(6901, 11024, 11105, 12127)
<b>2 – DD Tony Boehk</b>	(370, 2521, 6021, 13859)
<b>3 – DD Mike Davenport</b>	(5564, 9302, 10046, 11422)
<b>4 – DD Paul Messina</b>	(9638, 11341, 11898, 13294)
<b>5 – DD Mickey Dillow</b>	(1470, 7914, 8159, 10957)
<b>6 – DD Moises Mariano</b>	(205, 5058, 9462, 11787)
<b>7 – DD Jim Chakulski</b>	(2452, 2605, 2942, 10137)
<b>8 – DD John Navarro</b>	(1365, 11703, 11715, 14011)
<b>9 – DD Dave Wilson, Jr.</b>	(7870, 11259, 14572, 14775)
<b>10 – DD Dave Knitowski</b>	(2203, 2809, 9808, 14099)
<b>11 – DD Tom Kelly</b>	(2169, 5547, 11106, 11769, 15484)
<b>12 – DD Phil Tabbita</b>	(2279, 2293, 5482, 11484, 12128)
<b>13 – DD Mike Ragolio</b>	(7025, 10881, 10966, 11552, 14612)
<b>14 – DD Joe Cole</b>	(10885, 11304, 11619, 15003)
<b>15 – DD Tom Casey</b>	(4076, 5317, 11171, 11511)
<b>16 – DD Dick Belmonte</b>	(2002, 2427, 4714, 6188, 9729)
<b>17 – DD Deac. Hugh Mills</b>	(1960, 4449, 5466, 10648, 13069)
<b>18 – DD Kevin Kittka</b>	(2797, 5567, 9774, 12796, 13008)
<b>19 – DD Mike Mooney</b>	(2901, 4011, 14102, 14451)
<b>20 – DD Frank Billard</b>	(586, 685, 1058, 1442, 1771, 5450)
<b>21 – DD John Trainor</b>	(1393, 3960, 5208, 7612, 9127)
<b>22 – DD Mike Carroza</b>	(3489, 9053, 11616),
<b>23 – DD Howard Johnson</b>	(7559, 11618, 12180, 12524)
<b>24 – DD Roger Donnelly</b>	(1384, 3413, 5263, 8251, 11552)
<b>25 – DD Rainer Dombrowsky</b>	(1622, 1860, 11631, 11975, 12255)
<b>26 – DD Craig Clagett</b>	(2274, 7941, 11248, 12054, 14189)
<b>27 – DD Lee Eder</b>	(8736, 9815, 10100, 11372)
<b>28 – DD Herb Kraft</b>	(4606, 11615, 14535, 15678)
<b>29 – DD Tom Reumont</b>	(2065, 3849, 9258, 9968, 13091)
<b>30 – DD Mike Janus</b>	(2323, 6793, 13463, 14297)
<b>31 – DD Mike Jacobs</b>	(10525, 11815, 13290, 14726)
<b>32 – DD Romeo Paternoster</b>	(2577, 5381, 12254, 14455)
<b>33 – DD Mike Danowski</b>	(1965, 13295, 14534, 15000)
<b>34 – DD Thom Partenope</b>	(1733, 3964, 5206, 5370, 12001)
<b>35 – DD Rich Boehm</b>	(12612, 13573, 13982, 15297)

# INTRODUCTION

Our Order began in 1882 with a handful of men in the basement of St. Mary's Church and a visionary, Fr. Michael J. McGivney. His dream, the Knights of Columbus, is now a reality. The Order has provided an outlet for Catholic men to gather and exercise the principles of charity, unity, fraternity, patriotism and their catholicity for over 130 years. With a current membership of over 1.8 million members, we are the **largest international Catholic family-oriented, fraternal organization in the world!**

But we can do more! We are now in a position to help the Order achieve a momentous goal – to reach 2.0 million members in this decade. The State Deputy of Maryland has set a goal of assisting each council to be **successful** in reaching their membership goal of Star Council for the upcoming fraternal year. I know you may think this a lofty goal; however, our objective is to help each council to recruit their Star Council Quota and beyond. That is what will make our councils **successful** and as a team we can make it happen!

So who is your team? The State Membership Team is comprised of your State Officers, State Membership Director, State Retention Chairman, Regional Advisors, New Council Development Chairman, Fraternal Benefit Advisors and District Deputies. They are always available to answer questions, make suggestions and solve any problems that may arise. Utilize them, along with this handbook and other materials that you may receive, to ensure the **success** of your Council's membership plan. It is their job, and ultimately their goal to make you **successful**.

In addition, we also highly suggest you utilize your Chaplain; he is your greatest asset. You only have to ask for his guidance and spirituality. Ask him to design a spirituality program for your council. Make him part of your programs, not only with the Chaplain's report, but also with council functions. Ask him what he would like to see in the agenda for the year; what does the parish need and how the council can help fulfill those requirements. As committed as you are to the Order, he is as well.

**Here in Maryland, while numbers may be important, we feel that rather by "Making It Personal" we can Successfully achieve all of our goals. Each of us has a reason why we joined this great order, and like Pope Francis has said we need to reach out to those on our borders and share with them this Order we love.**

So what is our advice to you? Here are just a few ideas of what you can do to build your own **successful** membership plan:

## ***MAKE IT PERSONAL!!***

1. Develop a strong membership team within your Council to include a Membership Chairman, Recruitment Chairman, Retention Chairman and Admissions Committee. Be sure that the men you have chosen are comfortable in their positions. Are they able to be outgoing with people that they may not know? Can they communicate the ideals of the Knights of Columbus?
2. Educate your team with the guidelines outlined in this handbook and bolster their confidence. Show them that they are a critical part of your administration. This can also be done through the Chapter Meetings where special training for membership will be provided for the first half of the fraternal year.
3. **Develop a recruitment action plan for the fraternal year** with your membership team. By having a well thought out plan you will be prepared for all of your membership activities, which will ensure a strong year for your council. Each Council Member should focus on membership each and every day of the year. Each Council must tell their story. Each council must make a contribution to the Order today, tomorrow and every day going forward. In addition, each District should plan and hold a First Degree EACH Month! (Read the Membership column in the State Bulletin each month for tips on how to succeed.)

## ***MAKE IT PERSONAL AND ASK!!***

4. Include wives in the recruitment process. Wives can describe how they have benefited by their husband's membership and what is offered by the local council. She can relate her experiences and explain how the Knights of Columbus is a *family* organization.
5. **Lead by example!** Make an impression not only with potential members but with their families as well. Visibility is recognition. Make yourself available to the parish council and offer your services when feasible. This could afford you an opportunity for a church activity in the Surge with Service Program. When participating in a council or parish activity, always wear your name badge, council hat or council attire. ***Be proud. . . . Be visible as a Knight!***
6. Utilize your council insurance agent; remember that he is your own personal salesman on your council's membership team.

# **MAKE IT PERSONAL!!**

This handbook outlines the functions, responsibility and strategies for building “*your team*”. It will give you suggestions for membership programs; ideas for recruitment, retention and reactivating members; and forms that you will find beneficial. But these are only guidelines; tools for your to use. The leadership of the Grand Knight, the initiative of the council membership chairman and the support and participation of the entire council’s members and your State Membership Team are needed to ensure that you have a successful membership program.

***MAKE IT PERSONAL!!***

**Recruit** good quality Knights by having them attend an information night so that they truly understand the Order, the Council, our Principles and their financial obligation. **Retain** your membership by having a strong Surge with Service Program and contacting them on a regular basis. **Reactivate** former members who once had thought enough about our Order to join it, these men are perfect recruitment prospects. Follow this plan and you will **Revitalize** your Council’s membership and help our Order reach its ultimate goal of 2.0 million members!

***YOU JUST NEED TO Ask!***

***Remember “Make it Personal”!!***  
***“One Member,***  
***Per Council, Per Month!!”***

# Maryland State Council Knights of Columbus Membership Team Expectations

1. Attend District Deputy and Grand Knights Seminar  
(July 11-13 2014, Solomons Island Holiday Inn and Conference Center)
2. Attend State Mid-term Meeting  
(January 3, 2015 Columbus Gardens, Baltimore, MD.)
3. Attend State Council Spring and Fall Meetings
4. Ensure Districts and Councils attend State Program Seminars
5. Attend your Chapter Meetings and Encourage DDs to go as well  
(First ½ Year Recruitment Training, Second ½ year DGK Training)
6. Attend District Meetings Every Quarter and have Monthly Email Communications
7. Attend Every Council that seeks Membership Assistance.
8. Attend State Events and work to assist Chairman and look for Membership Opportunities
9. Make Appearances when Available at Council Events
10. Ensure Completion of Supreme Councils Forms On Time
11. Ensure Completion of State Council Program Reports On Time
12. Help Councils to Recruit New Members  
(One per Council, per Month)
13. Have Fun!
14. Answer all Communications and E-mails in a prompt timely fashion.
15. Read emails daily.

## INACTIVE INSURANCE & ASSOCIATE MEMBERS

Former and inactive insurance members are men who once thought enough of our Order to join it. Because of their knowledge of the Order, these men are perfect recruitment prospects. Focus on these former and inactive members in all recruitment efforts. Listings of former members and inactive insurance members are available from the Supreme Council Department of Fraternal Services. Call upon your State ROAR Team for assistance to assist you in this endeavor. This team is specifically designed for Retention Outreach And Reactivation.

## NEW COUNCIL DEVELOPMENT

New Council Development, while not usually addressed as part of membership, is in fact a key element and so closely related that we would be remiss to not include it in this handbook. If you are aware of a parish desiring a council, please notify your District Deputy and send a copy to the State Membership Director.

The goal of the Supreme Council as stated by Supreme Knight Carl Anderson is that *“we have nothing less than a moral obligation to offer every eligible Catholic man the opportunity and the privilege of membership in our Order”*. He also stated, *“we must have a Knights of Columbus presence in every parish”*. Father Michael J. McGivney had this same goal in mind when he first instituted the Knights of Columbus in 1882.

**Remember to have PARISH ROUNDTABLES for every Parish you support**

While this is a formidable task, it is not meant to paralyze those councils currently supporting several parishes nor those that possess substantial council homes. The real objective of a *“council presence in every parish”* is to afford a body of men who are ready and willing to take on the tasks requested by the pastor in support of parish programs a means to do so. *The pastor then has direct access to the resources of the largest international Catholic family-oriented fraternal organization in the world.* Given today’s environment, how can we as Knights refuse to offer ourselves, as servants of Mary, to the shepherds placed at the head of our parishes.

Development of a new council is technically the responsibility of the District Deputy working in conjunction with the New Council Development Chairman or Co-Chairmen and the Fraternal Benefits Advisor. However, most District Deputies who have started new councils have learned that they truly need assistance in order to succeed.



This overview is a condensation of Supremes New Council Development Handbook but is provided here to expand the corporate knowledge based in the Maryland State Council and to diminish some of the misconceptions generally held by neighboring councils.

During the development of a new council, the initial charter membership base is intended to be made up on new Knights and reactivated Knights. We expect to see a few transfers from nearby councils, but not wholesale movement. More often than not, there are men who have not been actively involved in their current council but do become active in their parish-based council. Therefore, we expect little impact on the membership of adjacent councils but rather an overall increase in the growth of the Order. This has certainly been the experience over the past several years in the State of Maryland during which time we have instituted several new councils and nearby council growth has generally been minimally affected and often has entered a period of growth.

Some key elements must be understood with regard to New Council Development. Regardless of the overall objective of the Supreme Office, not every parish can sustain a council. Minimum requirements for a new council are **20** new men. It eases the burden significantly if we have the approval and support of the pastor to start a new council. Experience has shown that the institutions, growth and longevity are very difficult if any of these elements are missing. The task of starting a new council is further simplified if another council in the area acts as a sister council and offers manpower and guidance in the initial membership drives, degrees and council organizational activities.

Our fraternal partners, Harry Canter, Robert Marlowe and Harry Helmick, serving as the General Insurance Agents, and their Fraternal Benefits Advisors in the field, can be of great assistance to the District Deputy. They enjoy a close relationship with the Supreme Council and can assist in getting support material in an expedited manner.

Once initial approval has been gained to begin a new council, it is imperative to move quickly in order to maintain rapport with the pastor. The District Deputy works with the pastor to identify a potential “key person” whom the pastor can use as a liaison with the Knights. The District Deputy will initially act as the council’s Grand Knight until the new council is formed and holds elections. The District Deputy should also appoint someone to act as the interim Treasurer and Financial Secretary. The District Deputy also coordinates membership drives with the pastor and ensures that other Knights are available to support these drives.

When the requisite number of members is recruited and the council is ready, the District Deputy will conduct the formal organization of the new council. The initial steps to be undertaken here are the choice of meeting nights, council name, and development of by-laws and election of officers. (**NOTE:** Councils may be named after deceased persons, localities or significant events. The Supreme Council prefers that no two councils in the same State Council have the **EXACT** name. For example there can be an existing St. Mary's of East Oshkosh Council and a St. Mary's of West Overshoe Council but not another St. Mary's of East Oshkosh Council.) After institution, the District Deputy submits the required paperwork and the Supreme Council issues the council a council number. The Charter Grand Knight nominates up to two persons to serve as permanent Financial Secretary. One is then selected by the Supreme Council to serve a three-year term.

In recognition of the institution of a new council, it is customary for the District Deputy to notify the State Officers and the State Membership Director of the date of the installation of officers and request their attendance. The District Deputy should also send notification to the State Officers and the State Membership Director as to the council's installation ceremony date. It is also appropriate to request a Fourth Degree Color Corps and Honor Guard to participate in the installation. Try to set dates that do not conflict with State programs, trips or other activities that would limit attendance.

***\*\*\* Note: Due to the stresses of administrative change-over and the development process of a new council formation, No New Councils will be started after March 1<sup>st</sup> of the Last Fraternal Year of the State Deputy's Term. This is again being done to ensure the successful formation of a council and to allow for the best chances for the council to thrive.***

## FUNCTIONS AND RESPONSIBILITIES

The **success** of any program is dependent upon the commitment of its leaders. They will provide the interest, the motivation and the execution for the goals they set. The excitement, drive and ambition of each of the main positions of the membership team will come from one man . . . . ***The Grand Knight!***

### **GRAND KNIGHT**

**The Grand Knight is the current CEO of his council.** It is up to him to ensure the proper functioning of the council. The membership, financial, organizational, and procedural well-being of the council is his responsibility. It is up to the Grand Knight to set the climate for his year, motivate and drive the chairmen he chooses to support him, and keep the programs lively and entertaining for the membership. It will be up to the Grand Knight to:

- A) Establish membership goals (recruitment and retention). Review your requirements for Star Council and commit to exceed them.
- B) Commit to **OUR MEMBERSHIP 365 STRATEGIC GROWTH PLAN.** This is not to exclude two major recruitment drives during the Fraternal Year.
- C) Schedule frequent First Degrees, preferably close to the recruitment drives.
- D) Appoint membership, recruitment, admissions, and retention committee members from Brother Knights who are energetic, enthusiastic, knowledgeable and dedicated.
- E) Appoint a “ceremonials chairman” to ensure that the degrees scheduled will be carried out without fail.
- F) Oversee council functions pertaining to membership (membership drives, retention efforts, information nights, and open houses).
- G) Keep in constant contact with all functioning committees to assure that the goals are on track.
- H) Keep the District Deputy informed of degrees and membership drives and asks for his assistance if needed.
- I) Promote teamwork, cohesiveness and cooperation between the committees to help reach the ultimate goal.

**The Grand Knight is the HEART of the council**  
**The members are the blood**  
**The Grand Knight is responsible for keeping the blood flowing**  
**And keeping the body alive and active!**  
**New blood helps to revitalize organs that may become idle.**

## **MEMBERSHIP CHAIRMAN**

The Membership Chairman is responsible for the Council's entire membership plan and is a direct extension of the Grand Knight. Chosen by the Grand Knight for his enthusiasm and dedication to the Order and the council, he is responsible for:

- A) Choosing the recruitment, admissions and retention committee members. Choose wisely and be assured of their commitment to the Order and the Council. Remind each of them of the vital role that they hold in the future of their council.
- B) Instructing each of the committee members on how to be effective in their capacities.
- C) Teaching them how to "sell" the Knights of Columbus above other prospective organizations competing for their time and attention.
- D) Re-educating yourself and the committee members on the principles of the Order and its precepts. Be ready to answer the question WHY?
- E) Allowing your committee members to try new methods of recruiting and guiding them to achieve the goals set by the Grand Knight.
- F) Coordinating degree dates with the Grand Knight. Make sure that eligible members are informed of all degree ceremonials in the area and make an effort to keep them on track advancing through the ranks.
- G) Publicizing and supervising recognition programs for active sponsors.
- H) Be sure to convey to the new members not only the principles of the Order, but also the financial responsibilities and our need for their active participation. Remember these new brother Knights are the future of our Order.

## **RECRUITMENT CHAIRMAN**

The Recruitment Chairman is empowered with carrying out a membership plan to support the council's membership goals. He should:

- A) Know the qualifications for membership.
- B) Work to promote recruitment of men into our Order.
- C) Keep the members of the council ever vigilant to aid him in his efforts to increase the membership.
- D) Constantly plan programs in pursuit of the goal.
- E) Plan open houses, church drives and be present at parish functions where Catholic men gather.
- F) Be familiar with the State and Supreme recruitment programs and make use of the information and advertising material they offer.

In working with the sponsor, the Recruitment Chairman can:

- A) Supervise the two-on-one recruitment of new members.
- B) Assist the financial secretary in preparing the new recruits for their First Degree.
- C) Assist the Grand Knight by aiding in the new recruit's assignment to a council committee as soon as they are recognized as a Brother Knight.
- D) Work with the Retention Committee to conserve membership wherever possible.

### **ADMISSIONS COMMITTEE**

The Admissions Committee is chaired by an appointee of the Grand Knight, Other members of the Committee should include: the Council Chaplain whenever possible. At the very least, the Chaplain should review every applicant to verify Catholicity. The Program Director, and two or three additional members, preferably well experienced Knights such as Past Grand Knights, Trustees, etc.

It will be the Admissions Committee's responsibility to meet at regular intervals (or more often if completed Form 100's are collected) and interview the prospective candidates. It will also be their responsibility to:

- A) Educate the candidate about the Knights of Columbus and gather information about the candidate.
- B) Be sure that the candidate understands what it is to be a practical Catholic. Is the candidate attending Church regularly?
- C) Inform the candidate about our principles and programs. Find out what the candidate's interests are and where he and the council would benefit by his involvement. Obtain a commitment to serve on one or more activity committees.
- D) Discuss with the candidate the financial obligations of belonging -- the initiation fee, dues and the insurance program offered by the Knights. Reference should also be made to the Fraternal Benefits Advisor who will also be contacting the member.
- E) Utilize an Admission Questionnaire (Form #391 or create your own) to retain records for the council about the prospective member -- birth date, marital status, children, wife's name, anniversary date and other pertinent information that will be beneficial to the council.

### **ADVANCEMENT CHAIRMAN**

Remember, Retention begins at the Admissions Committee and continues through all of the Degrees. Get the NEW Member involved!! **Make it Personal!!**

Assign a member to track EVERY member not a 3<sup>rd</sup> Degree Knight, keep a record of the member by name, phone number & sponsor and call everyone before every major degree until they become fully "A KNIGHT OF COLUMBUS"

This is the most under-utilized and most important chairman you can have. It was the goal of

Fr. McGivney for all Knights to make at least 3<sup>rd</sup> Degree. In the words of the State Deputy “Think about it can we really learn all the lessons the Knights have to offer if we only take the First Degree.”

## **RETENTION CHAIRMAN**

The Retention Committee should consist of at least three (3) members. The Grand Knight is the ex-officio member of the Retention Chairman, preferably a Past Grand Knight, and at least one other member. It is this Committee’s duty to establish a program to support the retention goals set by the Grand Knight and the council. Utilize the Financial Secretary when needed; he can supply you with a list of members at risk of suspension. **THE FINANCIAL SECRETARY IS NOT YOUR RETENTION COMMITTEE.**

This is your last chance to “re-recruit” members in danger of being suspended. When contacting members at this stage, be good listeners and try not to be defensive. Something made them join the Order at one time; try to rekindle that spirit in them again. Try to help them resolve issues they may have with the council or refer them to someone who can help.

The Retention Committee should consist of men who sincerely have the interest of the member and the Order at heart. They should be willing to hear any concerns that the delinquent members may have and create a positive plan to amend the situation. Seldom will a single call resolve the situation – be sure the Retention Committee is confirmed in its task. A member saved is a treasure to be guarded.

## **SUMMARY**

Both recruitment and retention begin the first moment a prospective member is introduced to the Knights of Columbus. You never get the chance to make a second impression; first impressions last a lifetime so make yours the very best. Each member of your council is a recruiter; each with their own personality and demeanor. Guide them through example and they will attract new members.

Retention is a function of involvement and belonging. If a new Knight is brought in and then left alone and uninvolved, you will lose him forever. Make him feel needed and wanted. Assess his individuality and match him with similar members. Show him how PROUD you are to have him as a member . . . PROUD to be his sponsor . . . PROUD to take him to his degrees . . . PROUD to introduce him to your council and its activities. ***YOUR PRIDE IS HIS PRIDE . . . WEAR IT LIKE YOU DO YOUR NAME BADGE!***

***MAKING IT PERSONAL!!***

# Recruitment

In this section, we hope to supply you with the necessary strategies for succeeding at membership **recruitment**. Use this as a guide to prepare your membership team so that they can execute an effective campaign. However, this is just a **GUIDE**. You must tailor these strategies to your own council's needs. Call upon your State Membership Team if you have any questions or difficulties. (*See the Supreme Council's booklet entitled "How To . . . Succeed At Membership Recruitment" – Form #2769.*)

- ❖ Organize Your Membership Committee and Set Your Goals
  - Select Knights who are dedicated and enthusiastic.
  - Set membership goals to exceed quota, achieve Star Council, break previous records, etc.
  
- ❖ Build a Prospect List
  - Include local priests, ushers, parish council members, choir members, lectors, new parishioners, and vendors and don't forget family members.
  
- ❖ Recruit Using 2-on-1 Concept
  - Organize two-man recruitment teams (can be a husband/wife team)
  
- ❖ Hold A Church Drive
  - Obtain pastor's approval for a membership drive – suggest having your drive on a Community Sunday and provide donuts/pastries.
  
- ❖ Conduct an Open House
  - "Exhibit your products" and what your Council and the Order have to offer.
  
- ❖ Organize and In-House Open House
  - Host an open house in a member's home; invite husbands and wives.
  
- ❖ Conduct a Recruitment Invitation Program
  - Send an invitation to each prospect's family; follow-up with a phone call/visit.
  
- ❖ Recruit Former Members
  - The easiest potential members to recruit are those that were former members. See Reactivation Section of this handbook.

- ❖ Promote Insurance
  - The Order was founded in part to provide financial security. Today, one of our primary fraternal benefits is still our insurance program. See the Insurance Section of this handbook for more information.
  
- ❖ Use an Admissions Committee
  - This will provide a mutual understanding of expectations and is the first step to membership retention.
  
- ❖ Schedule and Conduct First Degrees
  - Promptly advance new members toward full Knighthood to successfully build and maintain their membership.
  
- ❖ Recognize Council Recruiters
  - Let your recruiters know that they are a vital council asset; recognize and reward their efforts.
  - Utilize the Shining Armor Award from Supreme for NEW Members.
  - Utilize the Silver Knight Award from Maryland State for ALL Members.



- ❖ Order Supplies/Membership Videos
  - Utilize the many promotional materials available from the Supreme Council.
- ❖ **Remember that recruiting is a 365 day a year project.**



## HOW TO CONDUCT A SUCCESSFUL MEMBERSHIP DRIVE

- 1) **Time.** Coordinate your drive with a First Degree date. If your council does not have a team, check with other councils in your district for their degree dates, places and times. Do not lose a prospective member by making him wait too long for his initiation.
- 2) **Facility.** Clear the drive with the pastor. Are you prepared for inclement weather? Will there be other things going on outside the Church on that date? Consider every possible scenario and be prepared to adjust and regroup.
- 3) **Advertisement.** Place an announcement in the Church bulletin the week before the drive. Ask the pastor for permission to make a pulpit announcement. Better yet, ask your Chaplain to make the pulpit announcement. If he is willing, ask him to follow up with information of what the Knights have done in the parish for him and the value of being a Knight.
- 4) **Support.** Notify the following people about the drive dates and provide them with the Grand Knight's goals:
  - a. **The Chaplain.** Ask him to assist after Masses if he is available.
  - b. **The State Membership Team.** If possible we will have a team representative present to assist the council in their efforts. Contact your team member assigned to your district.
  - c. **The District Deputy.**
  - d. **The Fraternal Benefits Advisor.**
  - e. **The Council Membership Team.** Have men well versed in the Order present to answer questions. Have Knights well known in the parish visible. It may appeal to members to join based on their association with these men.
- 5) **Training.** Review with your membership team the following information. Make sure that the team is well versed in the principles of the Order, the tenants of our Faith and the workings of your particular council.
  - a. **Surge With Service Program** (how your council participates in each category)
    1. Family
    2. Church
    3. Community
    4. Youth
    5. Council
    6. Culture of Life
  - b. **State-sponsored Programs and Events**
    1. Widows Program
    2. Tootsie Roll Program (assisting the mentally and physically challenged)
    3. State Charity Fund (assisting members in need)
    4. Scholarship program (available to members and their families)

- c. **Communications** (have copies available)
    - 1. Knightline (Supreme newsletter)
    - 2. *Columbia* magazine
    - 3. Council newsletter
    - 4. Websites (Supreme, State, Council – if available)
  - d. **Supreme Fraternal Service**
    - 1. Insurance
    - 2. Retirement Annuities, 401-K Plan, Long Term Care
    - 3. Educational Funding Plans
    - 4. Scholarship Programs
  - e. **Recognition Programs**
    - 1. Knight of the Month/Year
    - 2. Family of the Month/Year
    - 3. Recruitment Awards (Shining Armor, Silver Knight and the Golden Knight, VIP, etc.)
    - 4. Retention Awards
  - f. **Membership Costs**
    - 1. Initiation Fees
    - 2. Council Dues (payment plans available)
    - 3. Time Commitment – Make sure they understand, the Knights of Columbus is glad for their commitment as THEIR schedule permits.
- 6) **Materials.** Place an order from Supreme for the following materials well in advance of your membership drive: (*At least 3 weeks*)
- a. Form 100's
  - b. Prospect cards (Form 921 – 921A) or make your own information sheets
  - c. Fraternal benefits flyers: #2761 – A Program of Fraternal Benefits, #2668 – College Education Guarantee, #1078 – Are You Enjoying All the Benefits of Membership, #2773 – Member/Spouse Fraternal Benefits, #3079 – Our Beliefs Are His Beliefs (obtain from Fraternal Benefits Advisor)
- 7) **Information Night (Open House).** Chose a date in the near future for prospective members and their families to meet with the Grand Knight, the Admissions Committee and the Fraternal Benefits Advisor.
- a. Have sponsors, or men willing to be sponsors, on hand for the event.
  - b. Have a television and VCR available to show Knights' videos.
  - c. Prepare a photo album or display of past events.
  - d. Allow time for the Chaplain, Grand Knight and Fraternal Benefits Advisor to speak **BUT KEEP THE PROGRAM SHORT!**
  - e. Have council members' wives on hand to answer any questions that the ladies may have.
  - f. Invite prospective members as the Grand Knight's guest to a social event that the council may be having in the future.
  - g. **GET THE FORM 100 SIGNED!**

- 8) **First Degree.** Have the dates, times and locations of First Degrees in the area available.
- a. The Grand Knight should send the candidate a personal invitation FOLLOWED UP by a Phone Call!!.
  - b. Offer to carpool the men to the degree if it is not at the home council.
  - c. Make sure that the sponsor or council representative accompanies the candidate to the degree. DO NOT ALLOW HIM TO GO ALONE!
  - d. Have the members' First Degree card prepared and with you.
  - e. The Grand Knight or sponsor should invite the candidate to sit with you for the rest of the meeting and during refreshments. Make him feel welcome.
  - f. Advise the candidates as to the dates for the second and third degrees and make arrangements to get the member there.
- 9) **Follow-Up – Keep Records.** Have a progress report on each candidate as they proceed through the ranks of Knighthood in our Order.
- a. Utilize forms in this handbook's appendix to keep track of new Knights.
  - b. Periodically review their progress and check on their involvement with the council.
  - c. Have sponsors call new members and invite them to council events. This way they will know someone and not feel like a stranger.

# Retention

Your Retention Plan begins at the Admissions Committee Meeting. Here you start to get your new Knight involved by:

- ❖ Having him participate in the “**Shining Armor Award**” Program during his first year as a Knight. To earn this award he must -
  - Be involved in at least three council service programs
  - Attend at least three council business meetings
  - Receive his Second and Third degrees
  - Meet with his Council’s insurance representative
  - Recruit at least one new member.
  - Remind him he’s eligible for the Silver Knight Award by recruiting a 2nd new member



- ❖ Have him participate in the “**Silver Knight Award**” This award is available to ALL Knights in the Maryland Jurisdiction. To earn this award he must –
  - Be involved in at least three council service programs
  - Attend at least three council business meetings
  - Be or Become a Third degree Member
  - Recruit at least TWO new members.



- ❖ Assign your new Knight a mentor. The mentor can keep him active by inviting him to council meetings and events and have him participate in program.
- ❖ Make sure that your new Knight is called when there is a meeting, event or Rosary.
- ❖ Keep them interested and **ACTIVE!**
- ❖ Think Regionally!
  - If a member is inactive or in arrears because they have moved, see if they can transfer to another council that is closer to them even if it is in another State! **This way you will not be charged with a suspension!**
- ❖ Some men will find that they are not suited for the Knights of Columbus. Rather than withdraw formally, a member may drift away and stop paying dues. ***Before stepping through the KofC Suspension Process, make a commitment to:***
  - ***Diligently attempt to reach the member. Listen to his reasons for drifting away.***
  - ***Use the knowledge you gain by listening to this member to improve the council, and possibly retain this member.***
  - ***Recruit 2 members for every member you suspend (net growth).***

- ❖ For those members that are in arrears, follow these guidelines and timeframes to complete the retention process:
  - Dues notices are mailed to members on December 15 and are payable as of January 1.
  - A second notice should be mailed on February 1 and a **Retention Worksheet** should be forwarded to the Council Retention team.
  - The third and final notice should be mailed on April 1.
  - The Council Retention Team should be attempting to contact the member by phone or in person to investigate why the dues have not been paid and to suggest a payment method (partial payment or is there a crisis)
  - After these attempts to contact the member have failed, the delinquent member's name and phone numbers should be forwarded to the District Deputy and your assigned Membership team member.
  - After May 1, the Grand Knight and the Financial Secretary should issue the Intent to Suspend – Form 1845. No member LESS than 12 months Past Due in their Dues should be considered for suspension, instead this time should be utilized by the retention committee!

This form has to be completely filled out and copies sent to the appropriate individuals at the same time. Forward a copy of the Retention Worksheet along with the State's Copy of the 1845 to the State Membership Director.

Any member who expresses a desire to leave the Order may withdraw provided that they submit a **personal written request** to the Supreme Office. (Form letters will no longer be accepted!)

No member should ever be suspended due to financial inability (not unwillingness) to pay dues.

## **Reactivate Former Members**

The easiest potential members to recruit are those that were former members! These men are familiar with the ideals of Columbianism and once thought enough about our Order to join. It is now time to give them another look so that we can rekindle their interest. Here are some ideas on how to do that.

- ❖ Appoint a special “Welcome Back Brother” or “Operation Re-Member” committee specifically to recruit former members.
- ❖ Obtain a list of “Former Members” (those who took withdrawals/suspensions) and “Inactive Insurance Members” (those who took withdrawals/suspensions but maintain Knights of Columbus insurance policies) from the Membership Director, Inactive Insurance Chairman or Supremes Department of Fraternal Services.

- ❖ Contact each member by phone and invite them to a “Welcome Back Brother” or “Operation Re-Member” night to reintroduce these members to the Order and your council. Inform them of the changes, new programs and activities, and recent council achievements that have occurred.
- ❖ Reactivating inactive insurance members qualifies the council for both membership and insurance additions toward Father McGivney and Founders’ Awards quotas.
- ❖ Reinstatements, readmissions or reapplications qualify the council for membership additions for the Father McGivney Award.

## **Keeping your council Strong!**

Membership is the key to keeping a council strong; it is the lifeblood of our Order. By having a strong and active Membership Plan you will have a stronger and more vibrant council. **Recruiting** new members brings in new ideas, new energy and new growth for your council. **Retaining** those members builds the character of the council and solidifies your programs. **Reactivating** former Knights builds a stronger sense of fraternity. By coordinating your efforts and utilizing these strategies, you will **revitalize** your council and bring new energy and new hope to our Order.

# INSURANCE

Offering life insurance to members and their families has been a part of the Order's program since 1882. Currently with over \$80 billion of life insurance in force and \$18 billion of assets, there is no higher rated insurer in North America than the Knights of Columbus. Our insurance program is operated solely for the benefit of its members and their families. It provides:

- *Annuity Program* – Enables member and spouse to provide for retirement and build an estate through tax-deferred savings.
- *Long Term Care Insurance* – Enables members and their spouses to safeguard their assets and afford the care and assistance needed later in life.
- *Member/Spouse Fraternal Benefit* – Accidental death coverage for member and spouse at no cost.
- *Orphan Benefit* - \$80 monthly allotment for orphans of eligible families; up to \$7,000 in college scholarships available.
- *Family Fraternal 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.
- *New Member Plan* – A low-cost whole life policy to new members and their spouses upon joining the Order.
- *Widow Benefits* – a) Continues to be covered under the Member/Spouse Fraternal Benefit; b) May purchase insurance, annuities, or Long-Term Care up to one year after insured member's death; c) Receives a free lifetime subscription to *Columbia*; d) Eligible with her children for scholarships.

Be assured that unlike other insurance companies, none of the monies held by the Knights of Columbus is used to fund any program contrary to our Catholic faith. The General Agent and Field Fraternal Benefits Advisors should be an integral part of your council's membership plan. Their expertise and knowledge of the Order and its insurance program are invaluable assets. Utilize these professionals to their fullest abilities. The General Agents in the Maryland State jurisdiction offer the Golden Knight Award as an incentive and recognition for recruiting five (5) or more members. Nominations for the award can be requested from any field agent.

The insurance program's origins and the integral role it plays in the life and growth of the Order is outlined on the Knights of Columbus insurance website at [www.kofcinsurance.com](http://www.kofcinsurance.com). Long-term care information must come from your local agent, as it is not offered in all states.

## MARLOWE AGENCY

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James Mwombela	202-246-2256 (Cell) 202-269-3420 (Home) <a href="mailto:James.mwombela@kofc.org">James.mwombela@kofc.org</a>	353, 3877, 4944, 5564, 11496
Kevin Nolan	703-906-2910 (Cell) <a href="mailto:Kevin.nolan@kofc.org">Kevin.nolan@kofc.org</a>	433, 5547, 11302, 14823, 15795

Michael Patten	240-305-6996 (Cell) <a href="mailto:Michael.Patten@kofc.org">Michael.Patten@kofc.org</a>	224, 2797 (L-Z), 11487
Christopher M. Stio, PGK, FIC	703-585-4978 (Cell) <a href="mailto:Christopher.stio@kofc.org">Christopher.stio@kofc.org</a>	2473 (I-R), 10723
Luigi Tanzi, LUTCF	240-793-7213 (Cell) <a href="mailto:Luigi.tanzi@kofc.org">Luigi.tanzi@kofc.org</a>	2473 (A-H)

## WESTERN MARYLAND

BENEFIT ADVISOR	CONTACT INFORMATION	ASSIGNED COUNCILS
Harry A. Helmick, FICF	304-428-0100 (work) 304-428-0101 (fax) <a href="mailto:harryhelmick@cs.com">harryhelmick@cs.com</a>	General Agent
John Sine	304-263-5535 (Work) <a href="mailto:jsinejr@aol.com">jsinejr@aol.com</a>	0586, 0685, 1058, 1442, 1771, 5450

## APPENDICES

<b>Documents:</b>	<b>Page No.</b>
❖ Documents Available on State Website ( <a href="http://www.kofc-md.org/pages/Membership/prog">www.kofc-md.org/pages/Membership/prog</a> )	33
❖ List of Favorite Recruiting Materials	33
❖ Sample Parish Bulletin Announcements	34
❖ Sample Pulpit Announcement	35
❖ Membership Drive Worksheet	36
❖ New Member Worksheet and Checklist	37
❖ Shining Armor Award Worksheet	39
❖ Silver Knight Award Worksheet	40
❖ First Degree Checklist	41
❖ Degree Reminder	42
❖ Degree Authorization	43
❖ Retention Worksheet	44
❖ Proper Billing Procedures	45
❖ Application for Relief From Payment	46
❖ Disability Exemption Guidelines	47

## DOCUMENTS AVAILABLE ON STATE WEBSITE

[www.kofc-md.org/pages/Membership/mbrprogrs](http://www.kofc-md.org/pages/Membership/mbrprogrs)

- ❖ Endorsement Letters (Cardinal McCarrick, Cardinal Keeler, Bishop Saltereli)
- ❖ Sample Pulpit Announcement
- ❖ Sample Parish Bulletin Announcement
- ❖ Sample Trifold Brochure
- ❖ Documentation of General Membership Procedures
- ❖ A List of Our Favorite Recruiting Forms
- ❖ Fr. Wolfe Council’s script for “Great Men” skit
- ❖ Regina Coeli Council document – “Who Are These Men They Call Knights”
- ❖ Outline for council membership Handbook
- ❖ Membership Drive Worksheet
- ❖ New Member Worksheet and Checklist
- ❖ Shining Armor Award Worksheet
- ❖ First Degree Checklist
- ❖ Sign-In Sheet
- ❖ Degree Reminder
- ❖ Degree Summary Report
- ❖ Degree Authorization
- ❖ Retention Chart
- ❖ Retention Worksheet (including suspension guidelines)
- ❖ Application for Relief From Payment
- ❖ Sample Fold over Council Info Flyer

### A FEW OF OUR FAVORITE MATERIALS

*(They are free from Supreme!)  
(Costs are incurred for shipping)*

	<u>Form No.</u>	<u>Title</u>
RECRUITING	781	Student Loan Program
	951	Financial Aid to Education
	1267	Did You Know?
	2761	Program of Fraternal Benefits
	2773	Knights of Columbus Benefits
	3079	His Beliefs Are Our Beliefs
	100	Form 100 – Application for Membership
LONG TERM CARE	4138	Dad Moved In With Us After His Medical Bills Got Out of Control
	4139	Now We Can Protect You and Your Loved Ones

## SAMPLE BULLETIN ANNOUNCEMENTS

1. On \_\_\_\_\_, the Knights of Columbus of \_\_\_\_\_ Council will be conducting a recruitment drive here at the parish. As advertised in the \_\_\_\_\_ (Catholic Standard, Catholic Review, etc.) you will see that the Knights have the full support of the Archdiocese and the Ordinary. Please consider joining our Order and experience what the Knights can offer you, your family, your Faith and your community. Please contact \_\_\_\_\_ at (\_\_\_\_ - \_\_\_\_ - \_\_\_\_) for more information.
  
2. With the full support of the Archdiocese and the Ordinary, the Knights of Columbus will be conducting a recruitment drive in the parish on \_\_\_\_\_. The Knights of Columbus is the largest Catholic family fraternal organization in the world and can offer you a deepening of your Faith, increase your family association and peak your community involvement. Please contact \_\_\_\_\_ at (\_\_\_\_ - \_\_\_\_ - \_\_\_\_) for further information. Join us . . . you won't regret it!
  
3. Have you considered deepening your Faith, your family involvement and increasing your community support? Then look no further. The Knights of Columbus, with full support of the Archdiocese and as advertised in the Catholic press, will be conducting a recruitment drive on \_\_\_\_\_. We have what you are looking for. Please contact \_\_\_\_\_ at (\_\_\_\_ - \_\_\_\_ - \_\_\_\_) for more information.
  
4. We are looking for eligible Catholic men over the age of 18 to help fill a void in our churches, our community and our youth, culture of life and family activities. We want you to join the Knights of Columbus. There will be a recruitment drive here at the church on \_\_\_\_\_, as advertised in the Catholic press. The Knights have been fully endorsed by the Archdiocese, the Ordinary and Our Holy Father. Please consider joining our ranks . . . you won't regret it! Please contact \_\_\_\_\_ at (\_\_\_\_ - \_\_\_\_ - \_\_\_\_) for more information.

## SAMPLE PULPIT ANNOUNCEMENT

I want to thank you Father for the privilege of allowing me to speak to the parish today. My name is \_\_\_\_\_ and I would like to talk to you about the Knights of Columbus here in the State of Maryland. We are the largest, family, fraternal service organization in the world. Pope John Paul II has referred to us as the right arm of the church and his own personal Knights. President George Bush referred to the Knights as “advocates for life” and acknowledged our ten-year history of over 1 billion dollars in charitable contributions and over 400 million hours of volunteerism. The Knights of Columbus is the first organization to assist those members of the police and fire and rescue team who lost their lives in New York on September 11<sup>th</sup>.

So what can the Knights offer to the men here at \_\_\_\_\_? Let me answer that while explaining our five service areas.

**Church** – we stand in solidarity with our priests and bishops. We support the vocations by offering monetary and moral support to our seminarians. Our parish priests know that to ask for support from the Knights is a project completed.

**Family** – we have many social events, which help to bring families together. Our family values are a pride of our Order.

**Community** – we support mentally and physically challenged people. Last year, the Knights of Columbus in the State of Maryland raised \$300,000, which stayed in the State to help God’s special children.

**Youth** – Soccer shootouts, basketball free throw tournaments, and baseball games are just a few of the activities that we offer our youth. Again our family values are a high priority of our Order. We strive to make the world a better and safer place for our children by setting the right example.

**Council** – By joining the Knights each man will be introduced to other Catholic men with similar values, beliefs, and concerns for the world around us. We can make this world a better place to live, one council at a time.

So now let me tell you what our council does in this community and for this parish.

**(Insert your council’s particular contributions)**

What does it take to join? There are only two requirements: 1) to be a Catholic male over the age of 18 years old and 2) to be a practical Catholic. What can you get from it? You will get a deepening in your Faith, a greater circle of friends with similar goals and ideals, and the ability to make a difference in your community, your church and your families.

I would like to personally extend to each Catholic male over the age of 18 here today an invitation to experience the pride and enjoyment that I have received from the Knights of Columbus. Please stop by and see us after Mass and we would be happy to answer any questions. Thank you for your time.





# NEW MEMBER WORKSHEET

NAME:						PHONE:						
ADDRESS:						DOB:						
WIFE'S NAME: DOB (MM/DD):			CHILDREN:			ANNIVERSARY DATE:						
SPONSOR:						PHONE:						
PARISH:												
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	INITIATION FEE
\$ ??		\$ ??		\$ ??		\$ ??		\$ ??		\$ ??		
TOTAL MONEY DUE		<b>IMPORTANT DATES</b>										
		\$ \$ PAID	ADMISSIONS COMMITTEE	VOTED	1 <sup>ST</sup> DEGREE	2 <sup>ND</sup> DEGREE	3 <sup>RD</sup> DEGREE					
<b>CHECK LIST</b>												
ITEM	ACTIVITY DESCRIPTION										DATE COMPLETED	
1	GET A SIGNED APPLICATION											
2	ADMISSIONS COMMITTEE QUESTIONNAIRE COMPLETED											
3	ENLIST A COMMITTED SPONSOR											
4	INSTRUCT CANDIDATE ON WITHDRAWAL POLICY											
5	GIVE CANDIDATE A COUNCIL INFORMATION HANDOUT											
6	GIVE CANDIDATE HIS FIRST NEWSLETTER											
7	SHOW KOC VIDEO OR FLIP CHART											
8	ADMISSIONS COMMITTEE REPORT COMPLETED											
9	1 <sup>ST</sup> DEGREE CERTIFICATE PREPARED											
10	2 <sup>nd</sup> DEGREE CERTIFICATE PREPARED											
11	3 <sup>rd</sup> DEGREE CERTIFICATE PREPARED											



**CHECK LIST**

ITEM	ACTIVITY DESCRIPTION	DATE COMPLETED
12	PLACE ON FIRST COMMITTEE OR PROJECT	
13	ENCOURAGE NEW MEMBER TO ORDER A NAME TAG	
14		
15		
16		

COMMENTS:



## Shining Armor Award

*(Must be earned within the first 12 months of membership)*

*Recruit 1 New Member*

*Name:*

*Meet with your Supreme Benefits Advisor*

*Date:*

*Participate in 3 Programs with your Council:*

- *Event*
- *Event*
- *Event*

*Date:*

*Date:*

*Date:*

*Attend 3 Business Meetings of your Council: Date:*

*Date:*

*Date:*

*Receive ALL 3 of your Degrees:*

*Date of 2<sup>nd</sup> Degree:*

*Date of 3<sup>rd</sup> Degree:*



Applicants Name: \_\_\_\_\_

Council Number: \_\_\_\_\_

District Number: \_\_\_\_\_

## Silver Knight Award

*(Must be earned during the Columbian Year – July 1, 2013 & June 30, 2014)*

***Recruit 2 New Members***

***Name:***

***Name:***

***Participate in 3 Programs with your Council:***

- ***Event***
- ***Event***
- ***Event***

***Date:***

***Date:***

***Date:***

***Attend 3 Business Meetings of your Council: Date:***

***Date:***

***Date:***

***Be a 3<sup>rd</sup> Degree Member:***

***Date of 3<sup>rd</sup> Degree:***

***Grand Knights Initials:*** \_\_\_\_\_

***Date submitted to the State:*** \_\_\_\_\_

*(NOTE: This form may be submitted electronically without the Grand Knights Initials)*

# FIRST DEGREE CHECK LIST

<b>Place:</b>		<b>Date:</b>
<b>Candidates Name:</b>		<b>Phone:</b>
<b>Sponsors Name:</b>		<b>Phone:</b>
<b>Degree Honoree</b>		
<b>CHECK LIST:</b>		
<b>ITEM NUMBER</b>	<b>DESCRIPTION:</b>	<b>DATE COMPLETED</b>
1	Candidate 1 <sup>st</sup> Degree Kit on Hand	
2	New Membership Card on Hand & Signed by GK & FS	
3	Degree Certificate for presentation	
4	Degree Team Captain Notified	
5	Vote to take out of council (If needed)	
6	Degree Authorization Form (IF OUT OF COUNCIL)	
7	Notify Financial Secretary	
8	Turn in Form 100 with Dues & Fees	
9	Order Name Tag	
10	Present Name Tag	
11	Introduce to Council	
12	Involved in FIRST Council Project	
13		
14		
15		
16		
17		
18		

# DEGREE REMINDER

Candidate:	
Degree Type:	Degree Date:
Degree Location	
Candidate Time:	Carpool Departure Time
Car Pool Departs from:	
Bring Check made payable to: _____	
For:	Amount:
Any problems or Questions Please call:	Gary Armbruster, Membership Director Home: (301) 668-3563 Cell (301) 980-0980
<b><u>DRESS SHOULD BE A COAT AND TIE</u></b>	

# DEGREE AUTHORIZATION

DATE OF DEGREE \_\_\_\_\_

TO: \_\_\_\_\_  
Financial Secretary

FROM COUNCIL No. \_\_\_\_\_

COUNCIL No. \_\_\_\_\_

LOCATION \_\_\_\_\_

Worthy Financial Secretary,

This is to certify that: *(Attach or list names)*

Have/has been granted permission to receive the \_\_\_\_\_ degree/s.

Council vote (First Degree)

Council Seal

\_\_\_\_\_  
Grand Knight

\_\_\_\_\_  
Financial Secretary

---

# DEGREE CERTIFICATION

TO: \_\_\_\_\_

DATE: \_\_\_\_\_

COUNCIL No. \_\_\_\_\_

LOCATION: \_\_\_\_\_

On \_\_\_\_\_ the \_\_\_\_\_ degree was conferred on: *(Attach or list names)*

\_\_\_\_\_  
Financial Secretary

COUNCIL SEAL

Council No. \_\_\_\_\_

Location \_\_\_\_\_

# RETENTION WORKSHEET

<b>Council No.:</b>		Membership Directors Name:		Membership Directors Phone No:	
Member Name:			Members Wife's Name:		
Phone No.			Member Address:		
Member Since:					
Total Dues Owed:			Council's Annual Dues:		
Number of Quarters In Arrears: (MINIMUM of 4)			As of:		
<b>Degree Dates</b>		1 <sup>st</sup> Degree	2 <sup>nd</sup> Degree	3 <sup>rd</sup> Degree	
COMMENTS/NOTES: (Please list all contact dates & notes from conversations)					
Date 1 <sup>st</sup> Contact Made: _____ By Whom: _____ Initials: _____					
Comments by Member: _____					
Comments/Recommendations by Retention Member: _____					
Date 2 <sup>nd</sup> Contact Made: _____ By Whom: _____ Initials: _____					
Comments by Member: _____					
Comments/Recommendations by Retention Member: _____					
Date 3 <sup>rd</sup> Contact Made: _____ By Whom: _____ Initials: _____					
Comments by Member: _____					
Comments/Recommendations by Retention Member: _____					
<b><u>PROCESSING DATES:</u></b>					
1 <sup>st</sup> Notice Sent:		2 <sup>nd</sup> Notice Sent:		Knight Alert Letter Sent:	
To Member	To Supreme	1845 to the State with this Worksheet		To District Deputy:	
Form 100 Sent To Supreme			Confirmation From Supreme		
<b>GK Initials:</b>			<b>DD's Initials:</b>		

## **PROPER BILLING PROCEDURES INCLUDING USE OF THE NOTICE OF INTENT TO SUSPEND & RETENTION WORKSHEET**

1. The financial secretary will mail the Membership Bill - First Notice Form #423 **15 days prior to the billing period.**
2. If payment is not received **in 30 days**, the financial secretary will mail the Membership Bill - Second Notice Form #424.
3. If payment is still not received **at the end of the first month** in which the member has failed to pay his dues:
  - The financial secretary will fill out a **RETENTION WORKSHEET** and insure that it is provided to the Council Retention Director. The WORKSHEET will now be used to manage and track activities as the Membership team investigates the status of the member.
  - A "Knight Alert" letter Form #KA1 will be forwarded to each delinquent member, signed by the grand knight and trustees. A copy will be attached to the WORKSHEET.
  - The grand knight will work with the Membership team and insure that this **RETENTION WORKSHEET** is completed. If the member is experiencing financial or other difficulty, the committee will make arrangements to accommodate him with a payment plan , dues assistance, or other appropriate help and make a notation on this **RETENTION WORKSHEET**.
4. If, **at the end of the second month**, the member still has not paid his dues and no accommodation or assistance was accepted by the member; the **Notice of Intent to Suspend** Form #1845 is to be prepared. It is signed by the financial secretary, countersigned by the grand knight, and distributed as follows:
  - The Original Copy is sent to the delinquent member.
  - The Supreme Office Copy is forwarded to the Department of Membership Records. The Supreme Knight will mail a personal letter to the delinquent member. This letter will convey the Supreme Knight's interest in having the member retain his "good standing" status.
  - The State Council Copy is mailed to your State Deputy along with a copy of this **RETENTION WORKSHEET**. The State Deputy will write to the member and the State Membership team will contact the member. Both offering assistance and advising him that the District Deputy in his area is available to help with any particular problems.
  - The District Deputy Copy is sent to your District Deputy along with a copy of this **RETENTION WORKSHEET**. He will attempt to contact the delinquent member to discuss the arrearage situation. In the course of the conversation, suggestions as to a possible solution will be recommended, and the District Deputy will volunteer to assist the member, if a need exists. The District Deputy will also determine 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 to the State Membership team. The Council Copy is retained for council files.
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 **Form 100 Membership Document, indicating suspension**. However, the suspension will not be processed at the Supreme Council office unless a Notice of Intent to Suspend Form #1845 has been on file for the required 60 days.
6. The Notice of Intent to Suspend Form #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 1845 form will be removed from the file under the assumption the council has been successful in retaining the member. The Form #1845 will also be **voided at Supreme by the State Deputy** if the **RETENTION WORKSHEET** is not filled out and filed properly and the efforts by the Council have not been proper as indicated by the information on the **WORKSHEET**.

**Note: WORKSHEET MUST BE INITIALED By Grand Knight & District Deputy**



**APPLICATION FOR RELIEF FROM PAYMENT  
OF COUNCIL DUES AND SUPREME AND  
STATE COUNCIL PER CAPITA TAXES**

I hereby certify that I, \_\_\_\_\_, \_\_\_\_\_  
Name Address

\_\_\_\_\_, am a member in good standing of Council No. \_\_\_\_\_ and that I am totally disabled and hereby request that I be relieved of payment of all council dues and Supreme and State Council per capita taxes under Section 118(e) of the Laws of the Order. In support of this request, I submit one of the following as evidence of my total disability.

- ( ) Certification from Health and Human Services, or
- ( ) Certification from Internal Revenue Service, or
- ( ) Certification from Veterans' Administration, or
- ( ) Certification from attending physician.

Dated \_\_\_\_\_ Signature \_\_\_\_\_

**CERTIFICATION OF COUNCIL**

Council No. \_\_\_\_\_  
Location \_\_\_\_\_

This is to certify that \_\_\_\_\_, \_\_\_\_\_  
Name Membership Number

is a member in good standing in this Council and that he has presented evidence of total disability that warrants consideration for relief from payment of all council dues and Supreme and State Council per capita taxes, under Section 118(e).

Attest: \_\_\_\_\_  
Financial Secretary Grand Knight

(Council Seal) Dated \_\_\_\_\_

**CERTIFICATION OF DISTRICT DEPUTY**

This will certify that Brothers \_\_\_\_\_ and \_\_\_\_\_ are the duly recorded Grand Knight and Financial Secretary respectively of Council No. \_\_\_\_\_

\_\_\_\_\_  
District Deputy

District No \_\_\_\_\_

Jurisdiction \_\_\_\_\_

**NOTICE:** Approval of this application for dues consideration does not have any effect on the waiver of insurance contribution on an insurance certificate held by the member.

# Knights of Columbus

ONE COLUMBUS PLAZA  
NEW HAVEN, CONN. 06510-3326

Charles H. Foos  
SUPREME SECRETARY

## MEMORANDUM

FROM: SUPREME SECRETARY  
RE: DISABILITY EXEMPTION GUIDELINES

At the Supreme Council meeting held in Chicago, Illinois, August 5-6-7, 1986, Section 118(e) of the Order's Laws was amended to read as follows:

"(e) Any member who is disabled by bodily injuries or disease and is thereby prevented from engaging in any occupation or employment for remuneration or profit and shall have been so prevented for a period of no less than six consecutive months may, on due request in writing to the Supreme Council and upon certification by evidence satisfactory to the Supreme Council of such disability, be relieved from the payment of all Council dues and Supreme and State per capita taxes as of the date of approval of said request and any suspension of such member for non-payment of such dues and tax shall cease as of the date of such approval."

Application for relief under Section 118(e) shall be made as follows:

1. The Application, Form 1831, shall be completed by the member, and attested to by the Grand Knight and Financial Secretary. The signatures of the council officers shall be certified by the district deputy
2. The application shall be submitted to the Supreme Secretary with one of the following as evidence of total disability:
  - a. Certification from Health and Human Services, or
  - b. Certification from Internal Revenue Service. or
  - c. Certification from Veterans' Administration, or
  - d. Statement from attending physician.
3. The application and supporting evidence shall be considered by a committee comprised of the Supreme Secretary, Supreme Advocate and Supreme Physician. Their decision may be appealed to the Board of Directors by the applicant only.
4. If the application is approved, dues and per capita shall be waived until the following December 31.
5. Application for renewal of relief under Section 118(e) shall be as follows:
  - a. The Supreme Secretary shall provide each council with a list of its members shown on Supreme Council records as exempt from payment of dues and per capita taxes as of October 1 of each year;
  - b. The Grand Knight and Financial Secretary shall certify to each member's continuing disability by signing the form;
  - c. The District Deputy shall certify that the Grand Knight and Financial Secretary who sign are the duly recorded council officers, after which the form is to be sent to the Supreme Secretary;
  - d. Upon receipt of the properly completed form by the Supreme Secretary, he shall continue the dues and per capita waiver under Section 118(e);
  - e. If the Grand Knight and Financial Secretary fail to certify the continuing disability of any member within the 90-day period, the waiver of dues and per capita charges shall terminate.
6. Where an application for relief under Section 118(e) is filed on a member duly qualified for recognition as an honorary life member, the Supreme Secretary shall record said application under Section 118(d).
7. Membership that is continued under the provisions of Section 118(e) shall be construed as active membership in computing the membership requirement for recognition as honorary or honorary life membership
8. Approval of an application for relief under Section 118(e) does not have any affect on waiver of insurance contributions on an insurance certificate held by the member