



**Knights of
Columbus®**

State Deputy Handbook

2025 - 2026

State Deputy Handbook

2025-2026

This handbook serves as a convenient reference guide containing answers to questions that might arise during a State Deputy's term of office. Detailed answers to many questions may also be found in the *Charter, Constitution, and Laws* and/or in the Officers' Desk Reference.

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STATE QUICK START

Key Contacts

Fraternal Mission – fraternalmission@kofc.org

Membership Records – membership@kofc.org

Member Management/Billing – expertfs@kofc.org

Knights Gear – support@knightsgearusa.com, 1-833-695-4872

Supplies Online – customersupport@webbmason.com, 1-833-591-7770

Catholic Information Service – cis@kofc.org

Ceremonials – ceremonials@kofc.org

Council Accounts – council.accounts@kofc.org

F.S. Appointments – financial.secretary@kofc.org

Legal Department – advocate@kofc.org

College Councils – college@kofc.org

Affiliate Membership – affiliate@kofc.org

Hispanic Growth – misionfraternal@kofc.org

Cor – cor@kofc.org

Key Reporting Dates

June 1 *Electronic Funds Transfer (#EFT)*

District Deputy Appointments (#189)

July 1 *State Service Program Personnel (#365-STATE)*

January 31 *Annual Survey of Fraternal Activity (#1728)*

April 30 *State Council Program Awards (#SPAW)*

Blessed Michael McGivney Medal (#BMMM)

Family of the Year Form (#10680)

As Required *Notice of Election of State Officers (#111)*

Helpful Contacts

Territory	Title	Name	Email	Phone	Jurisdiction
NORTHEAST	Territorial Growth Director	Ralph Rossi	ralph.rossi@kofc.org	203-410-1823	NY, PA
	Regional Growth Director	Bill Chasse	bill.chasse@kofc.org	203-361-8693	DE, ME, NH, NJ, VT, WV
	Regional Growth Director	Ken Latham	ken.latham@kofc.org	203-215-1183	CT, DC, MD, MA, RI
SOUTHEAST	Territorial Growth Director	Dave Tebo	dave.tebo@kofc.org	203-215-8379	GA, LA, SC
	Regional Growth Director	JC Reiher	claude.reiher@kofc.org	203-804-0332	AL, FL, NC, MS
	Regional Growth Director	Brandon Brown	brandon.brown@kofc.org	203-1215-5769	AR, KY, TN, VA
MIDWEST	Territorial Growth Director	Steve Cohen	steve.cohen@kofc.org	203-430-8528	MI, OH
	Regional Growth Director	Joe Ramirez	joe.ramirez@kofc.org	203-444-2954	IN, MO, WI
	Regional Growth Director	Jim Caffrey	jim.caffrey@kofc.org	203-214-7955	IL, IA, KS
	Regional Growth Director	Ray Lopez	ray.lopez@kofc.org	203-444-2921	MN, NE, ND, SD
WEST	Territorial Growth Director	Bob Kish	bob.kish@kofc.org	541-760-2821	CA, TX
	Regional Growth Director	Marty Yzaguirre	marty.yzaguirre@kofc.org	203-645-3336	CO, NM, OK
	Regional Growth Director	Chuck Davlin	chuck.davlin@kofc.org	203-500-1302	AK, HI, ID, MT, WA, WY
	Regional Growth Director	Pona Magana	pona.magana@kofc.org	203-430-7863	AZ, OR, NV
CANADA	Territorial Growth Director	Alain Cayer	alain.cayer@kofc.org	203-868-1585 or 203-868-1585	MB, QC
	Regional Growth Director	Paul Perry	paul.perry@kofc.org	203-823-8358 or 203-868-1585	NE, NS, ON, PEI
	Regional Growth Director	Ryan DeHaan	ryan.dehaan@kofc.org	475-306-3710 or 604-872-2269	AB, BC, NB, SK

ROLES, DUTIES AND RESPONSIBILITIES

Leadership Role

As the Supreme Knight's deputy within a jurisdiction, the State Deputy sets the tone of leadership within the State Council. His words and his actions will have a significant impact on whether the jurisdiction will successfully achieve its goals over the course of the fraternal year.

As chief executive, the State Deputy leads the board of state officers in the development of a five- year operational plan that defines goals for membership and insurance growth, new council development, programming, charity, awareness, communication and public relations in the jurisdiction.

The State Deputy and his officers are also responsible for ensuring that all district deputies, grand knights and financial secretaries within the jurisdiction receive the proper training in order to effectively carry out their roles. The State Deputy must also ensure that a comprehensive jurisdiction-wide communications system (phone, email, etc.) is implemented and is effective as possible.

Lastly, the State Deputy must clearly define the expectations that he has of his elected officers, his membership team, programming team and other appointed personnel. He must also set performance standards, monitor progress, keep all team members informed as needed, hold his team members accountable, and be prepared to replace anyone that fails to meet the standards he has set.

Support

In all areas, you will have the full support of your growth director. Each growth director is fully invested in the success of the jurisdictions he serves...his goal is to help you succeed.

He will help you to identify areas of growth opportunity in your jurisdiction, and will help you develop strategies and tactics to take advantage of those opportunities. He will be a constant source of guidance, support and encouragement to you and your team, and should be your first call whenever you have a question or need support.

Duties

Primary duties of the State Deputy include:

- Uphold and advance the vision of Fr. McGivney through your personal example, leadership appointments, communication, and state meetings and events;
- Grow the jurisdiction so that more Catholic men can live their faith and serve their family, parish, community, and country as Knights of Columbus.
- Representing the Supreme Knight and Board of Directors;
- Safeguarding the name and emblem of the Order in the jurisdiction;
- Implementing the letter and spirit of resolutions enacted by the Supreme Council (for example, the provisions of resolutions for the Culture of Life, and the use of council facilities);
- Serving as an ex-officio member of all state council committees;
- Chairing the board of officers which runs the affairs of the jurisdiction;
- Serving as liaison with bishops, priests and Church leaders in his jurisdiction;
- Overseeing the conduct of all ceremonials in his jurisdiction;
- Promoting national and state programs to the council level.

State Chaplain

At the recommendation of his state officers, and with the bishop's permission, the State Deputy appoints the State Chaplain (CCL, Sec. 12). The State Deputy should develop a close relationship with the State Chaplain, consulting with him regularly and making him an integral part of the State Council. As with subordinate councils, the State Chaplain can serve a vital role in helping the State Council achieve its membership and programming goals.

He can act as a key ally to his fellow bishops and priests and can promote the mission and works of the Order. To this end, the State Deputy is encouraged to appoint a State Chaplain who is committed to serving in the spirit of Blessed Michael McGivney and who is able to commit the time and resources toward this important role.

Early in his administration, together with the State Chaplain, the State Deputy should also plan to meet with the bishops of each diocese in his jurisdiction. The State Deputy should also make a point to develop a working relationship with the bishop's secretary.

The Supreme Council sends a leather-bound copy of the history of the Knights of Columbus and a stipend to each newly ordained bishop. N.B.: A stipend is sent when a bishop is elevated or transferred.

State Council Directors and Chairmen

The State Deputy also appoints the state membership director, [state program director](#), [State Evangelization and Faith Formation Director](#), the public relations chairman, and the chairmen of all State Council committees. Not only are these positions key to the jurisdiction's ability to achieve its goals, but they could serve as a means to develop future state leaders.

District Deputies

With the approval of the Supreme Knight, the State Deputy creates districts and appoints district deputies (CCL, Sec. 60). These appointments should be completed as soon as possible following the beginning of the fraternal year. At the state organizational meeting, the State Deputy should arrange for comprehensive training of the district deputies. The State Deputy should coordinate this training with the help of his Regional Growth and Training directors.

Additional Responsibilities

As the chief executive of the Order in his jurisdiction (CCL, Sec. 60), the State Deputy has many major additional responsibilities. These include:

- Make a written report on the condition of the jurisdiction at the annual meeting of the State Council;
- Make reports to the Supreme Knight or the Board of Directors when required;
- Supervise and oversee the conduct of ceremonials; schedule frequent exemplifications; and insist that grand knights hold frequent exemplifications;
- Approve all State Council activities and ensure that all conform to State Council by-laws and the Charter, Constitution, and Laws (Sec. 60);
- Ensure (through district deputies) that local council activities and programs conform to State Council by-laws and the Charter, Constitution, and Laws (Sec. 62);
- Ensure that District Deputies submit annual reports on council health, DD 944, by September 15 and take actions as needed to assist struggling councils.
- Approve and set budgets for all State Council programs;
- Promote the Supreme Council's Faith in Action, Church Loan, Culture of Life and United in Charity programs;
- Designate one or more state officers or chairmen to assist councils in achieving Star Council status and entering the jurisdiction's best programs in the Service Program Awards competition;
- Notify the Supreme Knight which bishops in his jurisdiction should be invited by the Supreme Chaplain to the Supreme Convention no later than February 1. The following should be noted:
 - Invitations will be extended only if State Council pays for the transportation of the bishops.
 - The Supreme Council will pay for hotel, states dinner ticket and all registration fees. Supreme will also send a stipend to the bishop for his participation in the convention.
- Designate a state officer or appoint a report forms chairman to work with councils to make sure required reports are filed properly and on time, especially the following:
 - *Report of Officers Chosen for the Term* (#185 — due June 30);
 - *Service Program Personnel Report* (#365 — due June 30);
 - Council EFF Director Submission Form (#EFF-C - due June 30);
 - [State Evangelization and Faith Formation Director](#);
 - *Annual Survey of Fraternal Activity* (#1728 — due Jan. 31);
 - *Special Olympics Reporting* (through the online Fraternal Programs Report Form) - (#10784 - due Jan. 31);
 - *Semi-Annual Council Audits* (#1295 — due Feb. 15 and Aug. 15);

- *State Blessed Michael McGivney Award* (#SBMMA - Due before the state council's deadline, typically well in advance of its state convention).
- State Council Service Program Awards (#STSP - Due before the state council's deadline, typically well in advance of its state convention).
- *Columbian Award Application* (#SP-7 — due June 30)
- State Family of the Year Award (Family of the Year Entry Form - Due before the state council's deadline, typically well in advance of its state convention).
- *Pilgrim Icon Program Logbook* (#10741 - collected by state council starting June 1).
- Encourage the use of the Member Management application;
- Engage Affiliate & Online members by inviting them to regional & State events;
- Promote national and state programs to the council level;
- Review and sign completed *Ultrasound Initiative Applications* (#10716) upon council requests.
- Solve problems at the local, district and state level;
- Implement resolutions enacted by the Supreme Council.

Effective Communication

At the beginning of the fraternal year and regularly thereafter, the State Deputy should meet with state membership, new council development and program personnel to ensure that they have established a plan of action for the fraternal year that aligns with the goals that the State Deputy has established. All activities should be planned and performed to achieve set goals. Also, the State Deputy should maintain regular contact with his district deputies to ensure that goals and programs are understood and are clearly communicated to local councils.

The State Deputy must also focus on keeping local councils connected to, and a part of, State Council goals and activities. This is best achieved by constant communication between the State Deputy and his district deputies, encouraging state officers and personnel to attend local council functions and make effective use of the State Council's bulletin, website and social media strategy.

Membership Growth

Membership growth is the State Deputy's highest and most important priority. Achieving this goal requires clarity of vision and a positive attitude. The State Deputy must have a positive and proactive attitude and foster that attitude throughout his jurisdiction with enthusiasm and constant support from his officers and membership team. Major areas requiring the State Deputy's focus and attention include:

- **Membership:** The State Deputy should clearly understand the goals, awards and reports provided by the Supreme Council, especially with reference to the Star Council Award. He must be the architect of the operational plan to achieve growth and empower the state membership director to execute the plan. He must also drive Online Membership within his jurisdiction. There are many resources on Supplies Online to help you and your councils achieve your membership goals.
- **New Council Development/Round Table:** The State Deputy must be familiar with NCD procedures, expense rules, and the Round Table program, and he must constantly encourage his district deputies to watch for and nurture all opportunities.
- **Insurance:** The State Deputy should know the financial benefits of the Order's insurance program. He should develop strong relationships with the general agents within his jurisdiction, support them and their field agents and look to them for assistance. He should use every opportunity to promote the insurance program.
- **College Councils:** The State Deputy should fully support and promote college councils. He should ensure that college councils receive adequate support and officers training, as college councils usually have an entirely new officer corps each year. He should help college Knights transfer to local councils upon graduation. Refer to the section on "College Councils" for more information.
- **Council Retention and Reactivation:** The state retention team is responsible for urging councils to keep their accounts current, and for assisting councils that require assistance to file forms, elect officers, recruit new members, and conduct business and programs.

- **Hispanic & Ethnic Councils:** The State Deputy should actively search to expand the Order in those communities that have no Knights of Columbus presence. This includes Hispanic, Vietnamese, Korean, Chinese communities, etc. Please contact the Fraternal Mission Department for further guidelines. Spanish-speaking councils can email misionfraternal@kofc.org or call 203-752-4270, opt. #4.
- **Cor:** The State Deputy should encourage councils to implement Cor in their parishes. Cor is an opportunity to engage all men of the parish community in prayer, formation, and fraternity. While it is not a recruitment initiative, it will foster the relationships that down the road may lead to membership.

Membership Retention

Councils that participate in the Affiliate Member Initiative (AMI) may use the temporary billing procedures found on the Officer Resources section of kofc.org.

For councils that have not participated in the Affiliate Member Initiative (AMI), the historical “Member Retention Billing Procedures” remain in effect. The State Deputy shall be sure that the state membership team, district deputies, grand knights and financial secretaries understand the procedures completely and follow them.

Upon receiving the *Notice of Intent to Retain* (#1845) from a council’s financial secretary, the State Deputy should have a positively-worded conservation letter sent with his signature to each member in arrears.

The categories for restoring the membership of a suspended member include:

- **Reinstatement** — This transaction can be used if membership termination has been for a period of three months or less. Reinstatements can only take place in the council from which the member was suspended or took a withdrawal. A reinstatement will not reflect a break in membership. No council vote is required.
- **Readmission** — This transaction is appropriate if membership termination has been for a period of more than three months and up to seven years. The applicant may be readmitted into the council of his choice. Council vote on his membership is required, but action by the admission committee is normally not needed.
- **Reactivation** The proper transaction for reentry of an inactive insurance member is reactivation. An inactive insurance member has been suspended for nonpayment of dues but maintains an in-force Knights of Columbus insurance certificate.
- **Reapplication** When an applicant has been out of the Order for more than seven years, reapplication is the proper transaction to be used. He may reapply to the council of his choice, and the re-applicant need not be exemplified again if he satisfies the admission committee that he’s already done so. He pays no initiation fee.

The Supreme Knight sends a congratulatory letter to each new or readmitted member.

Telling the Knights of Columbus Story

Public Relations is a vital component of every state deputy’s administration, and a useful communications strategy to let people know what the Knights of Columbus is about and the good works that our members do. The state deputy can help to promote a positive image of the Knights of Columbus with a variety of audiences and help attract new members.

By keeping proactive communications in mind as part of your overall event planning, you will encourage grand knights to follow your lead. The Supreme Council’s Corporate Communications team stands ready to support your efforts. Where to start:

- Appoint a state public relations chairman to share stories with diocesan papers, mainstream news media and social media channels. Give your public relations chairman a budget, and keep him updated on important activities so that he can, in turn, do his best to promote your activities.
- Ensure that your state public relations chairman participates in quarterly communications calls with the Supreme Council’s Corporate Communications Team. These calls will provide insight into upcoming initiatives, social media campaigns, best practices and updates on communications. Contact communicationsdept@kofc.org to ensure you are included on the invitations to join upcoming calls.

- You can also contact communicationsdept@kofc.org for guidance, support and assistance with media outreach for your larger events.
- Make the most of social media. With so many people online, your jurisdiction's social media presence is a critical tool to raise awareness, increase participation in jurisdiction events and recruit new members.
- Tag the Supreme Council with @kofc.org when you post on social media so that we can re-share your content.
- Ask your public relations chairmen to keep a record of their media interaction and outreach to share with us in our meetings.
- Read and keep on file *Columbia* magazine, *Knightline*, and the *Public Relations and Publicity Guide* (#2235).
- If you publish a state council newsletter and website, appoint someone to maintain these so they are up to date. Dated content will detract from your public relations efforts.
- Refer to the Supreme Council website (kofc.org) regularly for the latest program information and encourage all local, district and state leaders to do the same.
- Urge councils to report activities (ideally in advance) to the Supreme Council and the state council. Email information to knightline@kofc.org or knightsinaction@kofc.org.
- Consider advertising in diocesan newspapers within the jurisdiction.
- Encourage local councils to appoint active public relations chairmen.
- Issue monthly or quarterly communication to all councils.
- Approve the communications of all chairmen to ensure that they are consistent with state policy and are distributed in a timely fashion.
- Use business cards — available through Supreme Office at volume prices.

Note: The policy of the Order prohibits commercial insurance advertisements in state or local council bulletins, brochures or ad books. The State Deputy must be sure that all state personnel and local councils understand and abide by this regulation.

Media Inquiries

Media inquiries regarding ordinary fraternal and charitable activities of the Knights of Columbus within a local jurisdiction should be handled by the state deputy. Where there is an issue that may have regional or national importance involving the greater Knights of Columbus organization, a member of the hierarchy or member of the clergy, or a senior member of the leadership in the Knights of Columbus, the media inquiry should be referred to the Supreme Council. Under no circumstances should someone speculate on an issue to a member of the media, even if seeking to be helpful. Please contact: communicationsdept@kofc.org. **For more information on dealing with the media please consult the *Knights of Columbus Public Relations and Publicity Guide* (#2235).**

Emblem Use for Promotional Purposes

Please email brand@kofc.org in the event of questions about the use of the emblem for external council or state purposes.

EVANGELIZATION AND FAITH FORMATION

Blessed Michael McGivney's Vision

As a priest and pastor of souls, evangelization and faith formation were at the heart of Blessed Michael McGivney's vision for the Knights of Columbus. He recognized the immediate need to form men in their faith and provide the opportunity and means to keep them faithful and active within the Church. The Evangelization and Faith Formation division of the Supreme Council seeks to further and strengthen this purpose of the Order. A major initiative of this ongoing effort is the implementation of *Cor*.

State Evangelization and Faith Formation Director

At their discretion, State Deputies are invited -- in collaboration with their State Chaplain -- to appoint a State Evangelization and Faith Formation (EFF) Director. Under the direction of the State Deputy, the State EFF Director is responsible for advancing the evangelization and faith formation initiatives of the Supreme Council, specifically adoption and implementation of *Cor*. State EFF Director oversees the development of a state EFF team to support him in his role. The Grand Knight of a council that chooses to implement *Cor* may appoint a Council EFF Director. The State Director is charged with providing support and coaching for the council EFF directors, along with resources and communication as needed. The State Deputy is encouraged to provide his State EFF Director opportunities for statewide communication concerning evangelization and faith formation initiatives. The Supreme Council's division of Evangelization & Faith Formation, shall directly support the State EFF Director. Role descriptions for this and corresponding council positions are available online at kofc.org/cor or can be requested by emailing cor@kofc.org.

Cor

Cor is a regular gathering of Catholic men as brothers in Christ which uses a simple, flexible framework of prayer, formation, and fraternity to grow in faith and virtue. *Cor* exists to form and strengthen Catholic men in faith and virtue as missionary disciples by drawing them into a deeper relationship with Jesus Christ through prayer, formation, and fraternity – the three key elements of *Cor*. The vision for *Cor* is to aid in transforming the hearts of men through Christ-centered brotherhood. Rooted in prayer, formation and fraternity, men will be sharpened in faith and virtue as they cultivate authentic friendships with Christ and each other. We envision a future where *Cor* continuously helps sustain these men to lead their families, strengthen their parish communities and courageously evangelize the world as missionary disciples of Jesus Christ. The word “cor” is Latin for heart and the root of the word courage. Faithfulness, courage, and virtue begin with the heart and are the inspiration for *Cor*. For more information on *Cor*, reach out to Sean Pott, Senior Director of Evangelization and Faith Formation at sean.pott@kofc.org or to the Supreme EFF Team, at cor@kofc.org.

The State Deputy should be the first to extend an invitation for his councils to adopt and implement *Cor*. In this invitation should also be provided the name and contact information for the State Director of EFF and resources for *Cor*, and directives for the Grand Knight. If a Grand Knight and council accepts this invitation, he is to respond to the State EFF Director of his intention, appoint a Council Evangelization and Faith Formation Director, who, under the leadership of the Grand Knight, will be responsible for *Cor*. This includes running/leading, planning, communication, scheduling, and building a team of men from the council and parish to assist. The Grand Knight remains the main point of contact with the pastor and parish and is encouraged to bring his appointed Council EFF Director into said communication concerning *Cor*. The involvement of the Grand Knight in *Cor* is optional and should be determined by the Grand Knight and Council EFF Director.

FAITH IN ACTION PROGRAM MODEL

We know that the chance to roll up our sleeves and demonstrate our faith through service is as powerful as it is rewarding. The calling is a fundamental part of the Knights history and the foundation for our program model, Faith in Action. This mission-driven platform is an excellent way to express our service program, as it speaks to our own efforts and to the interests of prospective Knights.

The Faith in Action model is a realization of the changing needs of men in the twenty-first century. It seeks to balance all of our key priorities with theirs — **Faith, Family, Community, and Life** — and present them in a way that is clear to our leaders, members and prospective Knights. The simplicity of Faith in Action allows councils to concentrate on implementing quality faith-filled family programs. Our goal is for men to lead their family in service – not leave their family for service. The focus of this streamlined program is quality, not quantity.

Woven within these four categories is the opportunity to share something that all generations and cultures within our organization seek in their membership in the Knights of Columbus. The Faith in Action model allows us to come together to share our faith, celebrate fraternity with our families and do what we do best — stand shoulder to shoulder in service to our community and to defend life at all stages and in every condition.

Program Categories

A well-rounded council will have activities in each of the following categories: Faith, Family, Community, and Life. These programs are meant to inspire your councils to put their faith into action; councils may choose to implement several of these programs or may develop programs unique to the parish or community. By conducting programs, councils continue Blessed Michael McGivney's commitment to serving those in need. For detailed information on all programs, please visit kofc.org/faithinaction.

Featured Programs

The Supreme Council has designated select programs in each category as Featured Programs. When your council conducts a featured program and satisfies the associated requirements, it will receive two credits for that particular program category.

FAITH	COMMUNITY
RSVP	Coats for Kids
Into the Breach	Global Wheelchair Mission
Spiritual Reflection	Habitat for Humanity
Holy Hour	Disaster Preparedness
Pilgrim Icon Program	Free Throw Championship
Building the Domestic Church Kiosk	Catholic Citizenship Essay Contest
Rosary Program	Soccer/Hockey Challenge
Sacramental Gifts	Helping Hands
FAMILY	LIFE
Food for Families	March for Life
Family of the Month/Year	Special Olympics
Family Fully Alive	Ultrasound Initiative
Family Prayer Night	ASAP / Pregnancy Center Support
Keep Christ in Christmas	Christian Refugee Relief
Family Week	Silver Rose
Consecration to the Holy Family	Mass for People with Special Needs
Good Friday Family Promotion	Novena for Life

Faith in Action Programs — Table 2

Bold denotes Featured Programs

International Awards

Service Program Awards — Each year during a jurisdiction's convention, state councils should recognize the best program conducted by the councils in each of the four program categories. Winning entries — with the endorsement of the State Deputy — are submitted to the Supreme Council for consideration as an International Service Program Award winner.

Using one form per program entry along with supporting documentation, a subordinate council must complete and submit the *State Council Service Program Awards Entry Form* (#STSP) directly to the designated state council program chair. Any entries received by the Supreme Council from a subordinate council will not be considered for the International Award.

State Blessed Michael McGivney Awards — At the jurisdiction's convention, the state councils should recognize a Knights of Columbus chaplain with the State Blessed Michael McGivney Award. This winner will be considered by Supreme to be awarded the Blessed Michael McGivney Medal at the Supreme Convention.

Using one form per chaplain entry, a subordinate council must complete and submit the *State Blessed Michael McGivney Award Form* (#SBMMA). A subordinate council can submit an entry for either a subordinate or state council chaplain. Entries must follow proper protocol from subordinate council to state council to the Supreme Council. State and subordinate councils can submit winners from previous years.

Family of the Year

State councils should recognize a family of the year at their state conventions.. Subordinate councils must complete the Family of the Year Entry Form and submit it to the state council. The state deputy should sign the bottom of the form and submit it to the Supreme Council to qualify for International Family of the Year.

Jurisdiction Winners

When the jurisdiction has chosen its winners for each program category, a family of the year, as well as awarded a chaplain, they should promptly forward the submission to the Supreme Council Department of Fraternal Mission. Individual award entries must be forwarded to the Supreme Council office by April 30 to be considered. Please note: there is only one entry per category from a jurisdiction. If multiple entries are received per category, they will not be considered.

State councils should submit:

- *State Council Service Program Awards Entry Forms* (#STSP)
- *State Council Program Award Winners Form* (#SPAW)
- Executive summaries of the winning programs prepared by the state council, highlighting why they were chosen as the winners
- Original submission from the winning subordinate council
- Supporting documentation of the winning program
- *State Blessed Michael McGivney Award Form* (#SBMMA)
- *Blessed Michael McGivney Medal Form* (#BMMM)
- *Family of the Year Entry Form*

Award application content is extremely important in conveying the effectiveness of the program/chaplain. Submitting a quality entry will improve the chances of being selected as an international winner. Supporting documentation from subordinate councils can also be included with entry forms. Winners at the international level are recognized at the annual Supreme Convention in August. For a summary of the process and forms required, please review the *International/State Awards Submission Process Guide* (#11621).

Ordering Supplies

The Supreme Council has many materials available to help your council promote and conduct Supreme-recommended programs. Programming and print supplies can be ordered through Supplies Online, the supply-ordering portal available on Officers Online.

All Knights of Columbus-related gift and clothing needs, including K of C apparel, accessories, books, coats (Coats for Kids), religious supplies and liturgical items, can be ordered through Knights Gear.

Included below are tips to ensure that your order is processed and shipped in time for your programs:

- The ordering process works best using personal credit/debit cards.
- Fraternal Mission will no longer place orders for district deputies or council officers, except in rare circumstances.
- To see the latest listing of materials, please look items up and order them via Supplies Online.
- Please order materials at least four to six weeks in advance of your program date. Materials that are needed sooner will be shipped in an expedited manner; however, extra shipping charges will be applied to the order.

Coats for Kids – Supreme Matching Program for State Councils

State Councils can double the number of coats they donate by partnering with the Supreme Council for Black Friday (U.S.) and Boxing Day (Canada) distributions.

To participate, state councils must submit a proposal to fraternalmission@kofc.org that includes the following for each distribution:

- The number of cases need for the distribution. This requires advanced planning and communication. The number of coats of specific size and gender in each case can be found at Knightsgear.com (U.S.) or Knightsgear.ca (Canada).
- The location where the distribution will take place. Please note: Coats will only be shipped to a maximum of five locations per state or province.
- The local councils participating in the distribution.
- The demographics of the area the distribution will serve.
- The plan for leveraging the distribution as a membership engagement/recruitment opportunity.
- Any available media opportunities.

After the state council's proposal has been reviewed and approved by Supreme, the state council will receive a code to use on Knightsgear.com. The code can be applied at checkout to receive 50% off the total amount of coats proposed. For example, if the state council proposes a distribution involving 20 cases of coats, the code will reduce the cost by 10 cases.

Once the coats are received, the state council will partner with local councils to distribute the coats. We encourage every state deputy to participate in the incentive and help children stay warm in cold winter months.

DISASTER RELIEF

Every year, natural disasters occur in some jurisdictions. The Knights of Columbus has a Disaster Recovery Program, which is operated by personnel in the Office of the Supreme Treasurer and the Fraternal Mission Department, with assistance from our volunteers in the field. Requests for disaster relief should be directed to Fraternalmission@kofc.org.

Depending on the magnitude of the disaster, the Supreme Treasurer will initiate a fundraising campaign through the Supreme Council website (kofc.org) or an email blast notification, so that Knights of Columbus members in other jurisdictions and generous donors who are not members of the Knights of Columbus, can have a secure and reliable portal to contribute tax-deductible donations to support the Order's relief efforts. The funds collected are deposited into the bank account of Knights of Columbus Charities, Inc., which is recognized by the Internal Revenue Service as a public charity under Section 501(c)(3) of the Internal Revenue Code.

State councils, local councils, and assemblies are not authorized to initiate disaster relief fundraising campaigns outside their respective jurisdictions. For example, a state deputy in a jurisdiction that has been hit by a natural disaster may not solicit contributions from other state deputies or from councils in other jurisdictions.

The Supreme Council is here to assist you and your Disaster Relief team. We will take care of the fundraising and purchasing, while you and your team dedicate your resources to put boots on the ground to help people in disaster areas. For additional information, please consult the *Disaster Relief Handbook #11402*.

FINANCIAL MATTERS

Expenses and Responsibilities

The State Deputy is responsible for approving all state council expenditures. Some expenses and costs are paid by the Supreme Council while others are the responsibility of the state council. Each jurisdiction is given a budget by the Supreme Council for some State Deputy expenses and those of its district deputies. All other state officers and chairmen are reimbursed by the state council. New Council Development (NCD) expenses are paid by the Supreme Council and not charged to the state council budget. If the state council budget is exhausted, the State Deputy may ask the Supreme Secretary for consideration of additional funds.

Organization expenses incurred by the State Deputy-elect are chargeable to the Supreme Council beginning the day after his election. For budget purposes, expenses should be submitted and payment will be made after the start of the fraternal year.

The State Deputy may travel at will within his jurisdiction and the Supreme Council will pay for expenses related to the work of the Order, except for attendance at the annual State Council Meeting. The state council should establish a policy for reimbursing State Deputy expenses not covered by the Supreme Council. (***Note: Travel by State Deputy outside the jurisdiction must be first cleared with the Supreme Secretary and the host State Deputy. In no event are these expenses covered by the Supreme Council.***)

The State Deputy is responsible for verifying and approving:

- Expense accounts of all district deputies — these expenses are audited by the Supreme Secretary's office (***Note: Expenses incurred by district deputies while attending organizational and mid-year meetings of district deputies will be reimbursed by the Supreme Council subject to approval of the date, location and agenda of the meeting by the Supreme Knight. Other travel outside the district will not be reimbursed by the Supreme Council. A special request for travel outside of his district may be made to the Supreme Secretary stating the purpose for the travel. If granted, up to \$15 will be allowed for expenses.***
- Expense accounts of all state personnel payable by the state council
- Initiation fees (under age 26 — no more than \$10; juvenile insurance member, no more than \$5.00 if application is made before age 19)

State Officer Insurance Coverage

State officers, including the State Chaplain, the immediate Past State Deputy, vice supreme masters and masters are provided with 365-day, 24-hour accidental death and dismemberment insurance coverage in the amount of \$50,000 up to age 70.

After age 70 the coverage is reduced for all those mentioned above as follows:

- Age 70-74 65%
- Age 75-79 45%
- Age 80-84 30%
- Age 85 + 15%

Payment of claims will be in accordance with the "Standard Beneficiary Designation." The first beneficiary would be the spouse of the insured. If she is not living, the benefit is paid to the children in equal shares. If there are no children the benefit goes to the parents of the insured, then to the brothers or sisters, then to the estate, then on to subsequent classes. If the covered individual wishes to designate a beneficiary other than the "Standard Beneficiary Designation," he must complete a beneficiary card (available through the Supreme Office).

State Officer and Council Officer Bonds

The state secretary and state treasurer are bonded for \$20,000 each. Additional coverage is available through the Supreme Secretary's office at the rate of \$7.00 (U.S.) per thousand per year to a maximum total coverage of \$125,000.

Council treasurers and financial secretaries are bonded for \$5,000 each provided the two most recent audits are on file at the Supreme Council. Additional bonding is available through the Supreme Secretary's office at the rate of \$7.00 (U.S.) per thousand up to a maximum total of \$125,000 (U.S.).

Subordinate Council Financial Responsibilities

The State Deputy is expected to assist the Supreme Secretary and the state secretary in keeping all state and local council accounts and their financial obligations current.

(Local councils suspended because of failure to pay state council or Supreme Council per capita cannot be seated at the annual state council meeting.)

State council retention teams should work with suspended councils to help them become active again, and help reactivate dormant and inactive councils.

A state officer or a Past State Deputy should be appointed to follow up on the filing of council audits, to review them and make recommendations to the State Deputy and grand knight.

The State Council is required to file its own tax form with the IRS each year, such as a Form 990-EZ (Return of Organization Exempt from Income Tax) or Form 990-N. Any entity affiliated with the State Council (such as a state council charitable corporation) is also required to file its own separate tax form with the IRS each year. See further tax information about which form to file on page 25. Make certain that these tax returns are filed for the state council and its affiliated entities. Here again, appoint someone to make sure this is done.

SUBORDINATE COUNCIL MATTERS

Star Council Award

The Star Council Program is the Order's premier flagship award for successful councils that stay true to the vision of our founder, Blessed Michael McGivney. This program recognizes and rewards councils for excellence in membership growth, promotion of insurance and financial products, and Faith in Action programs.

The State Deputy should understand and promote the importance of the Star Council Award. The State Deputy must promote and expect at least one star council in each of the jurisdiction's districts each year. The State Deputy should also encourage, through his district deputies, the proper and timely submission of all forms and requirements for the Star Council Award.

Council Engagement

The Supreme Office regularly publishes the *Fraternal Leader Advisory* (FLA) and holds Webinars with valuable information and essential training for council leaders and members. The State Deputy should ensure all council leaders and district deputies are subscribed to the FLA and attend all webinars hosted by the Supreme Office. Past webinars and 'How-to' videos may be found at kofc.org/webinar.

Council Recovery Program

The Order has developed the Council Recovery Program (CRP) to get struggling councils back into Faith in Action activities. The CRP focuses on resuming operations in a way that inspires members and parishioners to become re-involved with church and community activities. The CRP has three key elements: parish support, interactions between state and local councils, and fraternal engagement. Recovery plans will be unique for each council. The CRP provides a basic framework. It can be modified as needed. Council leaders will meet with the district deputy or state council representative to assess the council's status and develop and institute the recovery plan. The State Deputy should familiarize himself, state officers, and all district deputies on the use of the CRP, found in the *Fraternal Excellence Guidebook* #11619.

Council Retention

A very important duty of the State Deputy is reactivating councils that have been suspended due to inactivity or nonpayment of Supreme per capita assessments. A State Council retention chairman should be appointed to work exclusively on these matters with the appropriate district deputies.

To reactivate a suspended or inactive council several steps are necessary. The State Deputy should ensure that the State Council retention chairman:

- Meets with the Pastor to discuss the value of Cor and a Knights of Columbus council. If the Pastor approves of a Knights of Columbus council, the State Deputy submits a Notice of Intent (#133). This is a vital step because it allows the Supreme Council to ship a reactivation kit to the district deputy.
- The reactivation coordinator should contact members on the council roster to determine their interest in taking an active role in the reactivated council.
- Conduct a Church recruitment drive. For the council to be reactivated the total number of members cannot be less than 30.
- Consider if it would be best to start Cor in the parish as a way to build a foundational number of men who may be interested in reactivating the council.

- Conduct an informational meeting to share the council vision discussed with the Pastor and identify potential leadership.
- Hold an election of officers and submit the Officers Chosen for the Term (#185).
- Nominate a Financial Secretary and submit the Nomination for Appointment as Financial Secretary (#103) and Application for Appointment as Financial Secretary (#101).
- Help the new officers appoint a Chaplain, Program Director, and Membership Director. Then submit the Service Program Personnel Report (#365).
- The State Deputy submits a statement of reactivation addressed to the Supreme Secretary. If necessary, he also asks for any delinquent Supreme assessments to be forgiven. If a new council name and or location is desired, it must be requested by the State Deputy in this letter.
- Sends all forms, including the State Deputy statement, to the Council Status and Health team at councilreactivation@kofc.org.

Council Mergers

Occasionally, local circumstances warrant the merger of two or more councils. Rather than closing a council, council mergers support those members who wish to remain active in council and parish life and ensures a continued Knights of Columbus presence in the community.

When evaluating council viability after Parish mergers, the State Deputy should consider three key questions.

1. What does the Pastor want?
2. How will impacted councils conduct Church drives?
3. How will impacted councils fundraise?

Based on the answers to these questions, the State Deputy should work with his Regional Growth Director on the right balance of councils and roundtables. **Merger requests submitted by the State Deputy will not be considered without an analysis report provided by the RGD.**

Under the Order's guidelines, merging councils must complete the following steps:

- Notify the District Deputy and State Deputy of the councils' intent to merge.
- Draft a resolution calling for the merger.
- Read the resolution at one (1) meeting.
- Publish the resolution to each of the council's members.
- Vote on, and approve, the resolution at the following meeting.
- After the councils approve the merger, the District Deputy sends the resolution and vote results to the State Deputy for approval.

If the State Deputy approves the merger, he will forward the request with all attachments to the RGD.

Once the RGD approves the merger, he in turn forwards the request and all the attachments to the Fraternal Mission department.

The Supreme Secretary will present the request to the board of directors for their approval or rejection at their next meeting.

A few notes:

- A new name could be adopted for the new council.
- We recommend keeping the lower council number.
- All members become the responsibility of the new council. The debt of the council that is to be merged can be cleared with a request from the State Deputy and approval of the Supreme Secretary.
- The past grand knights of each council shall retain all rights and privileges that pertain to past grand knights, and the grand knight of the council ceasing to exist by reason of the merger shall be entitled to the title, right and privileges of past grand knights without regard to the length of time served in such office. (SEC 249.2 Laws & Constitution)

Council Reinstatement

If in the future there is interest in re-instituting a merged/dissolved council, the *Council Development Guide* (#10506) needs to be followed.

Inactive Councils

Occasionally, due to local circumstances, merging or reactivating a non-functioning council is not an option. In those circumstances, a district deputy or state officer may indicate a recommendation for dissolution when submitting the *Annual Report on Council Status* (#944) for the council. The Supreme Council will evaluate historical data for these councils and when appropriate send the state deputy a list of councils in his jurisdiction that qualify for “inactive” status.

Upon confirmation from the state deputy, the members in these “inactive” councils will be designated as affiliates and engaged in the digital realm. “Inactive” councils will be removed from districts, delinquent form reports and every council active reports. These councils will be considered for dissolution at the discretion of the Board of Directors.

It is important to note that the process for designating a council “inactive” begins with the submission of an *Annual Report on Council Status* (#944) by September 15.

FRATERNAL MATTERS

Financial Secretaries

Because the position of financial secretary is so vital to the local council, the State Deputy should study the rules and procedures for appointment by the Supreme Knight and the three-year evaluation of financial secretaries where practical. The State Deputy should schedule annual financial secretary seminars. Given the geographical size of some jurisdictions, it might be better to plan regional seminars.

State Council Meetings

The required annual meeting of the state council, colloquially state convention, must take place within the geographic boundaries in which the state council is domiciled. It should feature daily Mass (at a minimum, a convention Mass and a Memorial Mass should be celebrated). The bishop of the diocese in which the meeting is being held should be invited to be the principal celebrant of the main convention Mass.

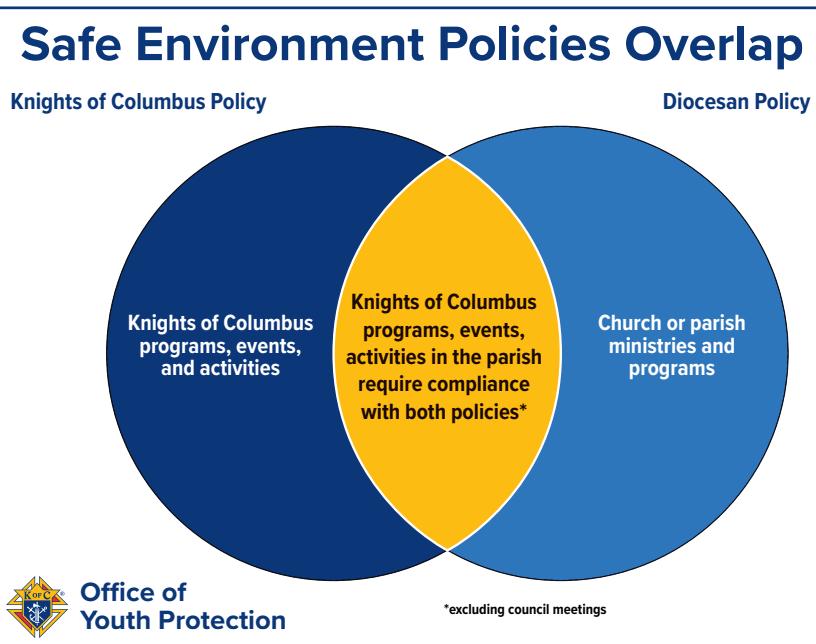
Other considerations in conducting your state convention include:

- Inviting all other bishops in the jurisdiction, former State Chaplains, council chaplains and neighboring priests to all affairs, especially the convention Mass and the banquet
- Holding an exemplification for candidates from the area during the convention
- Having all financial reports and resolutions in the hands of the delegates before action is taken
- Appointing a parliamentarian for business sessions
- **Having a CPA audit the books of the state council and its subsidiaries annually prior to the convention so that a report can be made. This is a must when funds are raised from the public in the name of the Order**
- Making sure the necrology lists former state officers and district deputies by name and title
- Making certain that state council by-laws are current and not in conflict with the Supreme Council by-laws. (Any changes to State Council by-laws do not take effect until approved by the Supreme Advocate)
- Strictly enforcing all rules limiting political campaigns for state council elections
- Setting strict guidelines for hospitality rooms and insisting that they are never open during any official convention function
- Inviting all general and field agents to the convention and designating one general agent to make an insurance presentation during one of the business sessions

Knights of Columbus Office of Youth Protection (OYP)

The Knights of Columbus takes very seriously its commitment to protect children and other vulnerable persons. When Brother Knights protect children and other vulnerable persons they serve, they live out their VOCATION of FATHERHOOD. In the words of Supreme Knight Patrick Kelly: "Protecting our children is the sacred duty of every Knight." This is why the Knights of Columbus has a policy of ZERO TOLERANCE with respect to abuse. This crime directly contradicts the identity and mission of the Knights of Columbus and has no place in the Order.

A critical part of our commitment to protect children and other vulnerable persons is to work together with local dioceses to ensure that we all meet our respective duties to protect. Our members are "Parishioners First, Knights Second." That is why the first requirement of our safe environment program is for our members to follow diocesan safe environment requirements applicable to members' volunteer activities in their parish. Our policy on diocesan requirements is straightforward - if members of the Knights of Columbus volunteer in their parish, whether in activities sponsored by the Knights of Columbus or in Church or parish ministry, they are not only volunteering with the Knights of Columbus, but they are also serving as parish volunteers. Our members must complete diocesan safe environment requirements applicable to parish volunteers in their respective parishes and dioceses. For more information visit kofc.org/safe. Please direct all inquiries to opy@kofc.org.



Compliance with Diocesan Safe Environment Requirements

When complying with diocesan safe environment policies, grand knights and financial secretaries of parish-based councils should:

1. Make a list of all members who serve as volunteers in their parish* for one or more Knights of Columbus programs, events, and activities. ("Eligible Member Volunteer List").
2. Ask each member on the list whether he has completed the diocesan safe environment training and background screening.
3. If the member volunteer has already completed the diocesan requirements, then the date of completion of the diocesan requirements should be recorded next to the member volunteer's name on the council's Eligible Member Volunteer List.
4. If the member volunteer has not completed the diocesan requirements, he must do so as soon as possible to maintain his eligibility to continue to volunteer for the Knights of Columbus in his parish.*
5. The council should provide its Eligible Member Volunteer List to the parish priest, the parish safe environment liaison, and to the diocesan safe environment coordinator upon request.
6. The council should update its Eligible Member Volunteer List with new member volunteers who become eligible to volunteer in their parish.*
7. The council should confirm the names on its Eligible Member Volunteer List regularly throughout the fraternal year.

Membership alone does not constitute volunteer activity. Membership does not require volunteer activity in a parish.* Members are not exempt from diocesan safe environment requirements applicable to parish volunteers by virtue of their being members, but neither are members mandated to complete diocesan

requirements simply because of their membership. Only when members step forward to serve within their parish as volunteers do the diocesan requirements become applicable, just like any other parish volunteer. Council business meetings are limited to members over 18 years old, and are not a parish or church ministry.

Reporting Allegations of Sexual Misconduct – ZERO TOLERANCE

When we receive allegations of sexual misconduct against one of our members, his membership is suspended, and he is removed from our organization. Nearly all allegations of sexual misconduct we receive are totally unrelated to membership in the Knights of Columbus and arise out of other circumstances in the member's life, such as employment situations, family situations, or within some youth serving program or church ministry. These allegations can vary, from a report of a boundary violation to an arrest, charge, or conviction of a sex or child related crime, or being listed on a sex offender registry.

A state or local council officer or a district deputy should notify the Office of Youth Protection at oyp@kofc.org as soon as possible when he becomes aware that a member has ever been:

- CHARGED WITH OR FOUND GUILTY BY A COURT OF ANY OFFENSE INVOLVING CHILDREN;
- CHARGED WITH OR FOUND GUILTY BY A COURT OF ANY SEX-RELATED OFFENSE; OR
- SUED IN COURT FOR ANY WRONGFUL CONDUCT AGAINST CHILDREN OR FOR A SEX-RELATED OFFENSE.

To the extent there is a need for suspension or other action, it will be handled by the Board of Directors, through the Office of Youth Protection and the Office of the Supreme Secretary.

In the rare circumstance of an allegation of sexual misconduct against a member directly arising out of his membership in the Knights of Columbus and in connection with a program, event, or activity sponsored by the Knights of Columbus, the Knights of Columbus follows a clear protocol:

- REPORT TO LOCAL LAW ENFORCEMENT
- NOTIFY THE DIOCESE
- NOTIFY THE KNIGHTS OF COLUMBUS VIA THE YOUTH PROTECTION HELPLINE **(844)-563-2723**.

Office of Youth Protection: oyp@kofc.org • 203-752-4558 • 855-845-3502 (fax) www.kofc.org/safe

Knights of Columbus Safe Environment Program (SEP)

Our Safe Environment Program (SEP) assures members and their families that we maintain a safe environment for all those whom we serve, protects members from awkward situations, misunderstandings, and appearances of impropriety, builds trust with dioceses and parishes, and protects the good name of the Knights of Columbus.

Our program is operated in conjunction with our strategic partner in youth protection and safe environments – PRAESIDIUM, Inc. Praesidium specializes in providing safe environment training and background checks to help prevent sexual abuse in organizations that serve youth and other vulnerable persons. For more information, go to www.praesidiuminc.com

Under Faith in Action, certain state and council officers/directors are required to complete the Order's safe environment training and may also be required to provide authorization for a background check.

If members in certain roles are not compliant within 30 days of notification, they are subject to removal from those roles.

Email addresses are required when completing the Service Program Personnel Report (#365) for the program, community, and family director roles. Praesidium, the Order's safe environment partner, will email grand knights, program, family, and community directors assigned usernames and passwords to complete the training. They will also email family and community directors a personalized link to provide background check authorization. The Knights of Columbus covers all costs associated with these requirements. Although the grand knight may also hold one of the following roles, there must be three (3) different members assigned to the program, family, and community director roles.

ROLES	TRAINING	BACKGROUND CHECK	OFFICERS ONLINE – REPORTS
State Council			
State Deputy	✓		✓
State Advocate	✓		✓
State Program Director	✓		✓
State Youth Director	✓	✓	✓
State Family Director	✓	✓	✓
State Community Director	✓	✓	✓
State Squire Chairman	✓	✓	✓
Subordinate Council			
Grand Knight	✓		✓
Faithful Navigator	✓		
Program Director	✓		✓
Family Director	✓	✓	
Community Director	✓	✓	
Chief Counselor	✓	✓	
Adult Counselor	✓	✓	

Safe Environment Program Training and Background Check Requirements

Email notifications are time-sensitive and require the recipient to complete training and background check authorization within 30 days of receipt. For a council to be compliant with the safe environment program, all SEP roles must be filled and compliant. If the council sponsors a Columbian Squire Circle, the Circle must also be fully compliant. The following criteria must be met for a council to be compliant with the requirements of the Knights of Columbus Safe Environment Program:

- 1) Email addresses are mandatory to appoint members into ALL roles that have safe environment requirements. Emails must be unique to the member, NOT generic like gkcouncil123@XYZ.com to ensure that members retain credit for completing their training and background checks.
- 2) There must be a Grand Knight assigned via Form 185 through Member Management.
- 3) The council must have submitted Form 365 Report of Program Personnel or named program personnel via online Member Management. Watch this video to learn how to submit online: https://players.brightcove.net/802593642001/y6FLilaOf_default/index.html?videoid=6191938577001
- 4) On the 365 Report, there must be three different members assigned to:
 - a. Program Director
 - b. Community Director
 - c. Family Director

*Grand Knights may only hold one of the additional director roles listed above.

- 5) All roles above must complete the safe environment training. The Community Director and the Family Director must also provide consent for a background screening (criminal and motor vehicle records).
- 6) If the council sponsors a Squires Circle, that Circle must be compliant for the council to be compliant. The following criteria need to be met for the Circle to be compliant:
 - a. Form 468 must be submitted appointing counselors every year
 - b. One (1) Chief Counselor must be appointed
 - c. A minimum of one (1) Adult Counselor must be appointed
 - d. The Circle must have a minimum of ten (10) Squires
 - e. For every additional ten (10) squires, there must be one (1) additional Adult Counselor

- i. Example 1: 10-20 Squires must have 1 Chief Counselor + 1 Adult Counselor
- ii. Example 2: 21-30 Squires must have 1 Chief Counselor + 2 Adult Counselors
- iii. Example 3: 31-40 Squires must have 1 Chief Counselor + 3 Adult Counselors
- f. Chief Counselor and Adult Counselor(s) must complete training and provide consent to a background screening.

All members who have access to Officers Online may view the safe environment status of their council or jurisdiction each week on the Reports tab.

Knights of Columbus Office of Youth Protection Member Helpline:
youthleader@kofc.org • 203-800-4940 • 855-845-3502 (fax) www.kofc.org/safe

Protocol and Ceremonials

At every level of the Order, proper protocol is important for the efficiency of programs and activities — as well as the impression that the Order makes on the general public and especially to its new members. In this regard, the state council should set the example by strictly following protocol and encouraging local councils to do likewise. A state “master of ceremonies” (who may be the state ceremonials chairman) should be appointed to assist the state council in matters of protocol for fraternal and religious functions. Also insist on proper ceremonials and protocol for meetings — salutes, titles, etc. (***Please refer to the Protocol, Meetings, and Ceremonials Book #11620 for details. The Fourth Degree Color Corp Drill Manual #808 is also helpful.***)

Exemplifications

The State Deputy is responsible for the proper conduct of all ceremonials within his jurisdiction.

Each State Deputy should appoint a state ceremonials chairman and work closely with him to promote ceremonials. The state ceremonials chairman should be skilled in all of the ceremonies and exemplifications of the Order, so that he can encourage dynamic ceremonial presentations.

All councils should be encouraged to establish a team to perform the Exemplification of Charity, Unity and Fraternity, and should host frequent ceremonials. Certification for these teams is not required. Performing the ceremony from memory is not required, but an enthusiastic delivery is imperative. All presenters must be skilled readers and speakers, fully comfortable with the wording, pronunciation, transitions and tone of the text. The preferred attire for the presenters is suit and tie with ceremonial baldric.

Teams should view the online video of the Exemplification of Charity, Unity and Fraternity and practice numerous times before conducting any exemplifications. Particular attention should be given to how their performances will be perceived and to their impact on candidates and guests.

The district master oversees the Patriotic Degree and should schedule Patriotic Degree exemplifications and activities in cooperation with the State Deputy.

Any questions regarding ceremonials should be directed to the Ceremonials Department, Ceremonials@kofc.org. (***Please refer to the Protocol, Meetings, and Ceremonials Book #11620.***)

Inactive Insurance Members

An inactive insurance member is one who has been suspended or granted withdrawal status from a council, but continues to hold one or more Knights of Columbus insurance certificates. He is carried on the council rolls and the council receives from the Supreme Council a credit of \$9.00 annually on the anniversary day of the oldest policy to help offset state and Supreme Council per capita assessments.

An inactive insurance member continues to receive *Columbia* magazine, may purchase additional insurance, and, unless he has been suspended for cause other than non-payment of dues, may reactivate his membership at any time. ***Inactive insurance members are not eligible for the Member/Spouse Fraternal Benefit or Family Fraternal Benefits.***

Change of Council Name or Situs

Under the Order's guidelines, a council must complete the following steps in order to change its name:

- Draft a resolution calling for the name change.
- Read the resolution at one (1) meeting.
- Publicize the resolution to each of the council's members.
- Vote on, and approve, the resolution at the following meeting.
- Forward the resolution to the State Deputy for his approval.

Note: If the resolution calls for the council to be named after a person (**must be deceased**), his biography must accompany the resolution. If the individual was a priest, the approval of the Bishop must be obtained before the name change can be approved. Bishop's approval must accompany the resolution.

- If the State Deputy approves the resolution, he will forward it to the Supreme Secretary.
- The Supreme Secretary will present the request to the board of directors for their approval or rejection at their next meeting.

The changing of the name of a council is an important action and should not be taken lightly, especially considering the historical significance to the council. Maintaining a religious name is generally preferred to a secular name. Guidelines are available from the Supreme Council office to assist in selecting a council name and can be found in Appendix D of the *Council Growth and Retention Guidelines* (#10506) booklet.

Jurisdiction Archives

State and local councils, assemblies, and chapters ("units") should have a system of maintaining records that complies with all relevant laws and regulations. A list of document types and suggested retention periods can be found in the Officers Desk Reference.

Each state council should maintain an archive of essential records in a secure, permanent, climate-controlled storage facility within the jurisdiction, such as a commercial storage unit. The following is a non-exhaustive list of essential state council records: budgets and financial records; state council by-laws and amendments thereto; proceedings of the annual state meetings; and resolutions submitted to the state council.

Records of Inactive or Dissolved Local Councils, Assemblies, and Chapters – The district deputy shall retrieve all documents, including charters, minute books, financial records, and other records belonging to a local council or chapter that is inactive, winding up, or dissolved. The district deputy shall transmit these materials to the state council, which shall maintain them according to the guidelines found in the Officers Desk Reference.

Before destroying records concerning well-known figures, (bishops, athletes, entertainers, politicians, etc.) or important events, please contact the Knights of Columbus Supreme Council Archives in New Haven at archives@kofc.org.

College Councils

Knights of Columbus college councils play an essential role in the mission of our Order. At a time when young men are leaving the Church in droves, we seek to keep men Catholic during their college years. Membership in a college council affords Catholic students the opportunity to nourish their faith among like-minded men while being formed as leaders in the Knights of Columbus. College Councils are a terrific way for your jurisdiction to bring on large numbers of faithful and engaged young members. Additionally, these councils are an important training ground for our Order's future state and local leaders.

The College Councils Department oversees over 330 college councils worldwide (including 150 in the US & Canada), promotes special programs and initiatives, and organizes the annual College Councils Conference. State deputies should use the experience and knowledge of the College Councils Department when interacting with college Knights. To obtain a listing of college councils, please visit kofc.org/college or contact the College Councils Department at college@kofc.org.

General Information

There are several benefits and best practices in place for college councils that state deputies should be aware of:

- The Supreme Council recognizes a college council as a council formed at a college or university that meets the needs of the students and their campus community. The majority of members should be university students (at least 50%), although faculty and community members may join. Officer roles should be filled by students. Alumni or community members may serve as trustees.
- The financial secretary of a college council should be a faculty member or a permanent member of the community; at no point should the financial secretary be a student. Having a more permanent member of the campus community serve as financial secretary provides continuity and oversight for the council as well as a liaison to the university administration.
- The College Councils Department has created a special line of promotional and programming materials for college councils. These materials include brochures and posters as well as programming materials like the College Movie Program and Consecration to St. Joseph. Free programming and recruitment materials are available to college councils via the Supplies Online portal. Contact the College Councils Department for additional information.
- Per *Charter, Constitution, and Laws*, (Sec. 37) college councils ordinarily receive a 50% rebate on all per capita assessments received by the Supreme Council. This rebate is to be used towards Catholic or fraternal programming with the council chaplain's approval. However, at the decision of the Supreme Secretary, College councils will not be assessed Supreme Council per capita, Catholic Advertising, or Culture of Life during the 2024 calendar year. This waiver will be considered annually by the Board of Directors. State Councils should strongly consider waiving state per capita or offering a per capita rebate for college councils.
- While there will be no Supreme Council assessments for college councils in 2024, it is recommended that college councils continue collecting council dues (usually \$20 - \$30) as usual to support council operations and activities.
- Councils at seminaries ("seminarian councils") are classified as college councils and fall under the management of the College Councils Department. In addition to the college program benefits, seminarian councils are currently exempt from all Supreme Council assessments. We encourage all State Councils to adopt the same policy.
- College Councils are exempt from the requirement to host two Fraternal Benefit Events for the Founders Award. They are only required to host one.

State Deputy Responsibilities

- The State Deputy should appoint a State College Councils Coordinator (SCCC) (or several, for larger jurisdictions) to oversee the college councils in their jurisdiction and/or to coordinate expansion into to new campuses. The SCCC should not be a current college student, but previous college membership experience is preferred. The SCCC will receive periodic communications from the supreme College Councils Department and will work to promote membership growth, best practices, and Star Council status among existing college councils in the state. The SCCC should make campus visits to the college councils in the state throughout the academic year. Additionally, he may desire to organize a state conference for college councils and members. For a detailed description of this role and its responsibilities, please reach out to the College Councils Department for a copy of the SCCC job description.
- State deputies may request additional training or officers training and guidance for their college councils. Throughout the year, the College Councils Department will travel to college campuses to promote growth and new council development. The College Councils Department will communicate visit plans with the State Deputy and local district deputies and can be reached at College@kofc.org.

New Council Development

- The Supreme Council annually pursues new council development opportunities on university campuses. State deputies or their appointed chairman should contact the College Councils Department by July 31 to discuss their ideas for new college councils or college council reactivations in their state.

The College Councils Department staff provides consultation and direction on campus development for both students and state leaders, including campus visits. There is also a special new council development kit for college councils that can be requested by contacting the College Councils Department.

- Prior to beginning new council or reactivation efforts on a college campus, the state deputy or state college councils coordinator should reach out to the College Councils Department for information and guidance on best practices.
- Naming college councils — new college councils should name their council after their college or university (i.e. Notre Dame Council 1477). This helps with identification and program management, as well as allowing all future members to identify with the legacy of their school's council.

College Councils Conference

- Every fall the Supreme Council hosts the College Councils Conference in New Haven, Conn. The annual conference brings together college Knights for a weekend of faith, fraternity, and leadership development. Attendees participate in a dynamic program of inspiring speakers, networking opportunities, and sessions on membership and programming best practices. The 2025 College Councils Conference will take place the weekend of September 26th - 28th in New Haven, CT.
- More information on the College Councils Conference, as well as conference registration, can be found at kofc.org/collegeconference
- Every college council is expected to send TWO (2) student representatives. They may also send a Chaplain. Supreme will book and pay for the travel of all accepted registrants. Everyone will have a roommate, including SCCC's, except for Chaplains, with no exceptions.
- Annually at the College Conference the Supreme Council recognizes the achievements of college councils over the previous fraternal year. The prestigious "Outstanding College Council Award" is given to the council that best exemplifies the mission of college program. Additional awards are given for the most outstanding programs in each of the primary service categories and for the highest gains in membership and insurance. Every college council is encouraged to apply for these awards. The application is available on the college website (kofc.org/college) and is due on June 30th.

FOURTH DEGREE

Structure

The controlling authority of the Fourth Degree is the Order's Board of Directors. The board:

- Appoints the Supreme Master and the Vice Supreme Masters
- Creates new provinces, districts and assemblies
- Makes, amends and changes all laws, rules and regulations of the Fourth Degree

The Supreme Master holds administrative authority in the Fourth Degree and supervises all of its officers and assemblies. He appoints Vice Supreme Masters and District Masters and makes detailed reports and recommendations to the Board of Directors.

The Supreme Assembly consists of the Supreme Knight, Supreme Secretary, Supreme Master, and Vice Supreme Masters of the Fourth Degree. The Supreme Assembly meets annually to consider all matters relating to the welfare of the Fourth Degree and recommends to the board of directors amendments to the *Laws and Rules Governing the Fourth Degree* (#1350).

Provinces

A Fourth Degree province exists under the authority of a Vice Supreme Master and consists of a number of Fourth Degree districts. The Provincial Assembly consists of the Vice Supreme Master and all District Masters in the province. It meets whenever the Supreme Master and the Board of Directors deem it advisable.

Districts

The Fourth Degree district comprises a number of local assemblies in a given area and falls under the authority of the District Master. The district assembly is composed of the Faithful Navigator of each assembly

and one delegate for each 100 members or major fraction thereof. It meets every two years in the even numbered years in March or April to consider Fourth Degree matters. It also selects three members to be recommended to the supreme master for his consideration in appointing a District Master.

Local Assemblies

Local assemblies serve one or more local councils and are structured like local councils, although different names are used for officers. The administrative authority of the local assembly falls to the Faithful Navigator.

Color Corps

The local assembly's color corps is led by the Color Corps Commander who is appointed by the Faithful Navigator. The color corps provides the honor guard for assembly functions as well as for local council functions, and may provide color guards for the ceremonies with the colors (flags). Refer to the *Fourth Degree Color Corp Drill Manual* (#808) for details on the color corps and uniform.

Color corps rank and office is indicated through two methods. First, by a colored flash worn on the beret behind the metallic Fourth Degree crest. Second by the wear of a colored service baldric. The color designation for flash & service baldric are as follows:

Color Corps Commander (purple), Faith Navigator (white), District Marshal (green), District Master (gold), Vice Supreme Master (light blue), and Supreme Master (navy).

Color corps members not holding office do not wear a flash behind the crest and uses the Fourth Degree membership service baldric.

(Note: Only Past Supreme Masters, Vice Supreme Masters, District Masters and Faithful Navigators are entitled to wear the color of their position after they leave office.)

Relationship to the Membership Degree

The Fourth Degree exists as a separate entity focusing on patriotism, but it is part of — not apart from — the Membership Degree. All assembly members must be members in good standing of the Membership Degree. (***Suspension or withdrawal from the Membership Degree automatically terminates membership in the Patriotic Degree.***)

The State Deputy is the chief executive officer in his jurisdiction. Although the State Deputy does not exercise administrative authority in the Fourth Degree, he should be concerned about the welfare of the Fourth Degree because its members are members of the Order under his jurisdiction. The State Deputy:

- May make recommendations to the supreme master regarding the appointment of vice supreme masters and district masters in his jurisdiction, as well as the creation of any new districts
- Clears all dates for Fourth Degree exemplifications set by the Vice Supreme Master or Masters in his jurisdiction to avoid conflict with state council programs (e.g. Installation of state officers, state convention, July and December district deputy meetings)
- Is kept informed by the District master of all programs of the Fourth Degree in his jurisdiction and should support these programs
- Should allow space in his jurisdiction's news bulletin for Fourth Degree news and encourage local councils to do likewise
- Includes a list of assemblies and officers in his state directory
- Recognizes Vice Supreme Masters and District Masters attending state council meetings and functions as State Deputies and State Officers should be recognized at Fourth Degree functions
- Sees that District Deputies have sufficient knowledge of the Fourth Degree to be able to report Fourth Degree matters to his councils

The Fourth Degree contributes to the stability of the Membership Degree because the suspension rate is less than one percent. Additionally, the Fourth Degree is the visible arm of the Knights of Columbus. The regalia and the presence of the color corps in churches and at other functions often lead potential members to consider joining the Order.

Fourth Degree Programs

Assemblies should not participate in or sponsor programs in competition or conflict with councils. Fourth degree programs include:

- The “Serving Those Who Served” Veterans Affairs Voluntary Service (VAVS) program
- Military Chaplains Scholarship Program
- Wakes and honor guards for Knights and veterans
- Flag Day June 14-Knights of Columbus “One Nation Under God” program
- Memorial Day cemetery services
- Assembly civic programs
- Culture of life efforts
- Parades and civic ceremonies
- Voter registration and “Get Out the Vote” campaigns
- Immigration, naturalization and citizenship programs
- Essay and poster contests on historical or patriotic subjects
- Flag display programs and distribution of patriotic information

INSURANCE MATTERS

Current Status

As of December 31, 2022, the insurance in force for the Knights of Columbus topped \$121 billion. During 2022, more than \$7.3 billion of new insurance was issued. These achievements are a result of the dedication of the Order’s professional field force of 74 General Agents, 86 Assistant General Agents and 819 Field Agents.

It is important to remember that these feats have been accomplished with only one out of every three members purchasing insurance from the Order. Our field force is to be commended – as you are, for the cooperation they are afforded – for the continued growth of the Order’s insurance program. Yet our potential is great. The goal is to make the Order’s greatest fraternal benefit, our top-rated insurance program, available to every Knights of Columbus member and his family.

Structure

The structure of our field force is simple and effective. The general agent is charged with recruiting, training and supervising the field agents in his agency. In some cases, he is assisted by one or several assistant general agents. Each agency can serve as many as 30,000 Knights of Columbus families, although agency size will vary depending on the territory and the general agent.

The regional agency executive consultant, who also serves as a general agent in charge of his own agency, is our regional executive, overseeing approximately 20 agencies. He serves as the region’s insurance leader, and acts as a liaison between the home office and the field force. He is assisted in his efforts by a field director.

With over two million members, our field force should continue to grow. This is the best way to ensure that the benefits of our insurance program are made available to every member and his family.

Products and Purpose

Remember that the Knights of Columbus insurance program was Blessed Michael McGivney’s principal motivation for founding our Order. He frequently witnessed the devastation wrought on Catholic families – including his own – when the breadwinner died unexpectedly. He saw the Knights as a solution to that problem.

In the years since he began the rudimentary insurance program, much has changed, but the mission of offering financial protection to brother Knights and their families has not. Today, that mission is carried out through a product portfolio that offers a wide variety of products designed to meet members’ needs. Permanent life insurance, term life, long-term care insurance, disability income insurance and retirement annuities are available in amounts large and small so that members in almost every age and income category can protect themselves and their families. The Order also offers many riders, features, and benefits on our plans to make them uniquely suited to our members and their families.

The Knights of Columbus also has Family Fraternal Benefits, an Orphan Fraternal Benefits program and a Member/Spouse Fraternal Benefit. The Family Fraternal Benefits program provides benefits to members with children that are physically challenged or intellectually disabled. The Orphan Fraternal Benefits program can provide a monthly stipend to orphans of qualified members until the orphan reaches their 23rd birthday if they are a full-time student. The Member/Spouse Fraternal Benefit provides a death benefit should a member (in good standing and his council must also be in good standing) or his spouse die as a result of an accident.

How are premium rates for life insurance established? The Order uses modern mortality tables to determine how many of a given group will die at certain ages. Modest assumed rates of interest are calculated as all funds collected by the Order are immediately invested. Reasonable expenses are also taken into consideration. These three factors — mortality, interest and expenses — if favorable, produce dividends (not guaranteed), which on an equitable and proportionate basis are returned to the policyholders.

Sales and Service

Life insurance is a product which is purchased with discretionary dollars — those dollars left over after the so-called necessities of life (food, clothing and shelter) are met. Without question, this type of product is difficult to sell. Yet this is the task facing a Knights of Columbus field agent. His earnings are based on commission (no sale, no pay). The work is time-consuming (most prospects are available only during evening hours). Additionally, much service work is associated with the administration of the product over long periods of time. A life insurance contract can be one of extremely long duration. A home mortgage might run as long as 30 years, but a life insurance contract can run much longer. The insurance needs and goals of the member will change over time and the field agent makes sure the member's insurance plan meets those needs.

To be successful in this rewarding job, our agents need the cooperation and support of the Supreme Council, the State Deputy, his officers and our entire membership. It's also important to realize that the financial resources afforded by our insurance program support many of our charitable and fraternal activities.

The most important job of the field agents is to sell adequate life insurance to our members. This is "job one." But the sale does not end the client-agent relationship. Our field agents also service the insurance, which often requires changes as time passes. Changes of beneficiaries, changes of address, loan and surrender requests, changes in plans, etc. are all routinely handled by the field agent. In addition, he is strongly encouraged to aid and assist local council officers with their membership goals and other activities, and he will make every effort to help. This help should be in the capacity of a committeeman, with committee chairmen positions held by fraternal leaders. State officers, district deputies and local council officers are encouraged to seek the assistance of our field force, just as they will often seek help from the State Deputy.

It is true now more than ever that our field force is comprised of well-trained, professional salesmen. With this in mind, the State Deputy should be aware of any member of the Order who would be interested in a full-time position in insurance sales, and refer that individual to the general agent. It is a career of hard work, without question. But it is also one filled with many rewards, both financially and spiritually.

How Can the State Deputy Help?

The State Deputy leads Knights in his jurisdiction in expression of our four founding principles of charity, unity, fraternity and patriotism. So too should he lead his Knights in appreciation of, understanding for and participation in our greatest and first fraternal benefit: the insurance program.

The State Deputy should give the Knights of Columbus insurance program positive exposure, mentioning our insurance benefits and promoting the field force as often as possible. The general and field agents should also be invited to meetings and be given the opportunity to speak.

Remember, Blessed Michael McGivney founded the Knights of Columbus as a fraternal benefit society. Protecting Catholic families has been our mission since day one, and our insurance program is our most valuable fraternal benefit, as well as the way in which we protect the most families.

In your many years of service, you have no doubt come across members who lack a complete understanding and appreciation of the mission, purpose, and history of our insurance program.

The State Deputy's main role as it pertains to that program is to foster a culture of positive understanding and appreciation for the program. Certainly not every Knight will need to or want to purchase all of the products the Knights of Columbus provides, but every Knight should consider it a point of pride that his Knights of Columbus is also a Fortune 1000 company, that is incomparably financially secure, and is unapologetically Catholic.

Encourage your council officers and state leadership team to shine a positive light on our insurance program early and often with new members. There are several great programs for new Knights that – in addition to their initial meeting with their field agent – can help demonstrate the power of this fraternal benefit. Profiles Professional in the United States and NaviPlan in Canada, both state of the art financial needs analysis tools – available exclusively through the field agent – is a great, free way for Knights and their families to assess their financial situation. The Knights of Columbus Personal Planning Workbook – also available through field agents – is a great tool to help Knights plan. The Young Adult Insurance program is a great and affordable way for our younger members to start themselves on the path to financial independence and responsibility.

The support of the state deputies and officers contributes substantially to the success of the Order's insurance program. We all share in the blame when a member passes away leaving his family without adequate financial resources. Likewise, we all share in the pride of knowing that the widow and orphans of a brother Knight can continue to live with dignity upon his death. This is what Blessed Michael McGivney had in mind when he founded this organization.

Fraternal Benefit Events

General agents and Insurance agents regularly hold Fraternal Benefit events, both in-person and virtual. These are educational presentations that focus on some of the most pressing financial issues that our members face today.

In these seminars, agents cover a wide range of topics from retirement strategies to estate preservation to charitable gifting and more. These exclusive events are designed to help our members become more aware of the tremendous financial benefits offered by the Knights of Columbus.

It is an opportunity for current and prospective Knights to learn more about the Knights of Columbus and the fraternal and financial benefits available.

GENERAL MATTERS

Church and the Hierarchy

Early in his administration, together with the State Chaplain, the State Deputy should plan to meet with the bishops of each diocese in his jurisdiction — ***a key point: get to know the secretary of each bishop.***

The Supreme Council sends a leather-bound copy of the history of the Knights of Columbus and a stipend to each newly ordained bishop. (A stipend is sent when a bishop is elevated or transferred.)

By February 1st, the State Deputy must inform the Supreme Knight which bishops in the jurisdiction should be invited by the Supreme Chaplain to the supreme convention. Invitations will be extended only if state council pays for the transportation of the bishops. The Supreme Council will pay for hotel, states dinner ticket and all registration fees. It also sends a stipend to the bishop for his participation in the convention.

Miniature Medals of Office

In 1993 the Order's board of directors approved the wearing of new miniature dress medals of office for certain former and past officers in the Order. The miniature medals of office replace the previous style of wearing around the neck a medal of office modified with the word "former" or "past." Miniature medals of office are to be worn on the left breast jacket pocket. Name badges should not be worn with miniature medals of office.

Positions for which miniature medals of office are available include:

- Former Supreme Director (F.S.D.)*
- Past State Deputy (P.S.D.)
- Former Vice Supreme Master (F.V.S.M.)*
- Former District Deputy (F.D.D.)
- Former District Master (F.M.F.D.)
- Past Grand Knight (P.G.K.)
- Past Faithful Navigator (P.F.N.)

* These Miniature medals are provided by the Supreme Office, and not available for purchase online.

Medals of Office

The Supreme Council provides the State Deputy with a ceremonial medal of office and dress medal of office. The Supreme Council automatically provides medals of office to all first-time appointees. Medals of office of other state officers are provided at the expense of the state council and can be purchased from KnightsGear and The English Company.

Scholarships and Fellowships

The State Deputy should also be familiar with the Supreme Council scholarship programs. These include:

Scholarships

- Fourth Degree Pro Deo and Pro Patria Scholarships of \$1,500 each are available to students attending Catholic colleges in the U.S. and to students at The Catholic University of America in Washington, D.C. The scholarships, four of them reserved for Columbian Squires, are renewable for four years. The number of scholarships awarded is determined by the earnings of the scholarship fund.
- John W. McDevitt (Fourth Degree) Scholarships of \$1,500 each are available to students attending Catholic colleges in the U.S. and are renewable for four years. The number of scholarships awarded is determined by the earnings of the scholarship fund.
- Fourth Degree Pro Deo and Pro Patria (Canada) Scholarships of \$1,500 each are available to students attending colleges or universities in Canada and are renewable for four years. The number of scholarships awarded is determined by the earnings of the scholarship fund.
- Matthews and Swift Educational Trust Fund provides tuition-only scholarships to Catholic colleges up to \$25,000 per year for children of members in good standing who, while serving in the military forces of their country in a combat zone, specifically designated as such by the Board of Directors, are killed by hostile action or wounded by hostile action resulting within two years thereof in permanent and total disability, and for children of members in good standing who are full-time law enforcement officers or full-time firefighters who, while in the lawful performance of their duties, are killed in the line of duty as a result of criminal violence directed at them. Applications must be filed within two years of the member's death or (for servicemen) disability.
- Endowed Scholarships of \$1,500 each are available to a limited number of students attending Catholic colleges in the U.S. and are renewable for four years.
- Mexico Scholarships of \$500 each are available to four students attending colleges in Mexico and are renewable for four years.
- Puerto Rico Scholarships of \$500 each are available to four students attending colleges in Puerto Rico and are renewable for four years.
- Philippines Scholarships of \$500 each are available to nine students attending colleges in the Philippines and are renewable for four years.

Fellowships

- Knights of Columbus Graduate Fellowships at The Catholic University of America in Washington, D.C., include tuition and an amount for living expenses. They are renewable for three years and administered at CUA.
- Bishop Charles P. Greco Fellowships of \$1,000 each are available for teachers of people with intellectual disabilities and are renewable for two years.

- Blessed Michael McGivney Vocations Scholarships (based on need) and Bishop Thomas V. Daily Vocations Scholarships (based on merit and academic excellence) of \$2,500 each are available to theology students pursuing a vocation to the priesthood for a diocese or religious institute in the U.S. or Canada. They are renewable for four years.
- The Pope John Paul II Institute for Studies on Marriage and Family Life in Washington, D.C., offers a limited number of fellowships.

Current information is available by visiting kofc.org/scholarships.

LEGAL MATTERS

The Laws of the Knights of Columbus grant authority to the State Deputy to resolve issues that may arise within his jurisdiction. The State Deputy should familiarize himself with the *Charter, Constitution, and Laws* of the Knights of Columbus, as well as his state council's by-laws and the standard local council by-laws.

Officers' Desk Reference

To assist state deputies, the Supreme Advocate maintains definitive guidance on various subjects relating to the governance of subordinate units on the Officers' Desk Reference ("ODR"), located on the password-protected section of kofc.org. The state deputy should take the time to review all of this guidance and should instruct the other state officers, especially the state advocate, to become familiar with the ODR as well. The content of the ODR is frequently updated, so state deputies should consult the ODR each time they address a particular issue. Please contact Customer Service at 800-380-9995 for a username and password.

Reporting Allegations of Misconduct

The Order is esteemed by Catholics and non-Catholics alike in all countries where we are established. This reputation is the legacy of innumerable good men and their families who have served the Church and their communities through the Knights of Columbus since 1882. Yet, as we have seen in recent years, great institutions can lose their good name in an instant through the negligence or misconduct of even one person. There is no reason to believe that this will happen to the Knights of Columbus, but we are not immune from the sort of allegations that have rocked so many other organizations, including colleges and universities, public schools, businesses and religious congregations. Accordingly, we must continue to follow our longstanding practice of reporting and addressing allegations of misconduct.

As stewards of the Knights of Columbus reputation, state deputies have a responsibility to know what is going on in their jurisdictions and to report to the Supreme Office any irregularities, misconduct, or abuse. The Order has procedures and protocols for effectively addressing allegations of wrongdoing, but we can do so only if we receive timely notification from our fraternal partners in the field. For this reason, state deputies should promote open channels of communication within their state councils and local councils, in order to receive critical information at the earliest possible stage. Upon receipt of such critical information, state deputies should convey it immediately to the Supreme Advocate at advocate@kofc.org.

In the rare circumstance of an allegation of sexual misconduct against a member directly arising out of his membership in the Knights of Columbus and in connection with a program, event, or activity sponsored by the Knights of Columbus, the Knights of Columbus follows a clear protocol: (1) REPORT TO LOCAL LAW ENFORCEMENT, (2) NOTIFY THE DIOCESE, (3) NOTIFY THE KNIGHTS OF COLUMBUS via the Youth Protection Helpline (844) 563-2723.

State, Local Council, Assembly and Chapter By-Laws

The Supreme Advocate is responsible for reviewing and approving the by-laws of newly formed local councils and assemblies and amendments to the by-laws of existing local councils and assemblies. In order to streamline the approval process, local councils and assemblies must submit proposed by-laws to the Legal Department by using "By-laws Online". The program features a standard by-laws template, which includes all essential rules of self-government. Using this program, local councils and assemblies may create a new set of by-laws, amend existing by-laws, receive automatic approval, and maintain a historic archive of by-laws that had previously been approved.

Since it established the By-laws Online program in 2008, the Supreme Council is no longer accepting or reviewing council or assembly by-laws that have not been prepared and submitted using the By-laws Online program.

If a council or assembly would like to add something to its by-laws that is not included in the standard by-laws template, the best practice is to adopt a standing rule by means of a motion or resolution presented at a regular business meeting. The rule would not be part of the council or assembly's by-laws but would be binding until amended or revoked. The council or assembly should retain a file of all such standing rules. Although approval of the Supreme Advocate is not required, any standing rule adopted by a council or assembly should be consistent with the Laws of the Order and the mission and identity of the Knights of Columbus.

A state council may amend its by-laws by adopting one or more resolutions at its state convention and then submitting the proposed amendments to the Office of the Supreme Advocate for review. Amendments to state council by-laws are not final until approved by the Board of Directors. The Board generally reviews proposed amendments to state council by-laws at its August meeting.

New chapter by-laws or amendments to existing chapter by-laws must be reviewed and approved by the Supreme Advocate's Office at advocate@kofc.org.

Tax Issues for Councils and Assemblies in the United States

All state and local councils, assemblies, and chapters (collectively "subordinate units") in the United States must have their own Employer Identification Number (EIN) from the Internal Revenue Service (IRS). Once a subordinate unit is issued an EIN from the IRS, it must report the EIN to the Supreme Advocate's Office via tax.ein@kofc.org to be included in the Order's IRS 501(c)(8) Group Ruling (#188), which exempts subordinate units from federal income tax.

All subordinate units in the United States must file an annual IRS Form 990 to maintain their tax-exempt status with the IRS. Subordinate units reporting gross receipts of \$50,000 or less with less than \$200,000 in assets may comply with their obligation by filing the IRS Form 990-N electronic postcard (also known as the e-Postcard). Subordinate units reporting gross receipts of more than \$50,000 but less than \$200,000 with total assets of less than \$500,000 must file the IRS Form 990-EZ. Subordinate units reporting gross receipts of \$200,000 or more with total assets of \$500,000 or more must file the IRS Form 990. Failure to file this return for three consecutive years automatically results in revocation of the subordinate unit's tax-exempt status. In order to reinstate its tax-exempt status, the IRS requires a subordinate unit to pay a \$600 fee and complete a lengthy application [IRS Form 1024].

Donations to subordinate units are not tax deductible. Members of subordinate units may not, under any circumstances, create charitable corporations or charitable foundations, including 501(c)(3) tax-exempt entities. Instead, subordinate units should work within the existing structure of the Knights of Columbus, which has enabled subordinate units to raise and donate hundreds of millions of dollars to charitable causes over the course of many years. Knights of Columbus Asset Advisors and Knights of Columbus Charitable Fund (KCCF) have recently introduced new investment and charitable vehicles that are suitable for subordinate units. More information can be found in the Council Investments Section, below.

For more information on tax issues affecting subordinate units please refer to the Tax Issues section of the Officers' Desk Reference on the password-protected section of the Knights of Columbus website, or email tax.ein@kofc.org.

Council Investments

In order to accomplish the charitable mission of the Knights of Columbus, councils routinely raise money, which can then be donated to worthy causes. This mission also calls our members to become personally involved in fundraising and charitable activities.

Although some councils maintain a large bank account or investment portfolio, we recommend that councils conduct their financial affairs and charitable giving so that accumulated general funds do not exceed \$10,000. Larger and more active councils may maintain a larger balance in order to cover the expenses for their activities. Also, some councils may exceed the recommended \$10,000 cap because of special circumstances, such as the receipt of a restricted legacy gift or proceeds from the sale of home corporation property.

The recommended \$10,000 cap on a council's general fund is intended to avoid common problems associated with the accumulation and investment of money. For example:

Investing and managing funds frequently causes discord and dissension among members who may disagree about investment decisions.

Conflicts of interest frequently arise when members (or friends/relatives of members) in the investment business seek to manage the funds.

The accumulation of large sums of money may lead members to handle those funds unwisely, despite their good intentions.

Having access to a large amount of funds may be a temptation to self-dealing on the part of some members.

Councils are authorized to receive funds into their general account in the course of ordinary fraternal and charitable activities. To the extent that these funds are not immediately disbursed for necessary expenses and charitable donations, they may be held in other bank and investment accounts. However, councils should never invest or hold funds in brokerage accounts, stocks, annuities, non-Catholic mutual funds (other than government money market mutual funds), bonds, or other investments, such as gold, silver or platinum. Except under the special circumstances described above, the Supreme Council does not advise, encourage, recommend, or permit councils to invest or hold funds in any type of account other than the following:

- Ordinary short-term certificates of deposit
- Simple savings accounts
- Simple checking accounts
- Simple money market accounts
- Government money market mutual funds
- Mutual Funds that comply with the United States Conference of Catholic Bishops Investment Guidelines (USCCB) including Knights of Columbus Mutual Funds

For example, councils may choose to place funds in excess of \$10,000 in a short-term certificate of deposit while waiting to disburse the excess funds for an intended purpose. It is also acceptable for a council to hold excess funds in a certificate of deposit as a reserve to cover a known expense or liability that is coming due in the future. The funds should be held under the name and Tax Identification Number of the council, and only the officers identified in the bylaws may have access to the account. The financial officers and trustees are responsible for keeping the members informed of where the funds are deposited. A program or committee chairman may never mix Knights of Columbus funds with personal funds.

In the event that a council receives proceeds from the sale of home corporation property, the council is encouraged to honor the legacy of the brother Knights who acquired and maintained the property over the long term. This can be done by investing in a diversified portfolio of Catholic values investments (e.g., Knights of Columbus Mutual Funds) to pursue ongoing charitable support in the name of the council.

Councils may not create charitable trusts or set up tax-exempt charitable corporations. However, councils that wish to set aside funds for charitable contributions are strongly encouraged to consider setting up a donor-advised fund. Knights of Columbus Charitable Fund (KCCF) has been established as a charitable corporation that offers a donor-advised fund in order to facilitate Catholic-compliant philanthropy for dioceses, councils, individuals, and other institutions. A Knights of Columbus council may set up a donor-advised fund with the KCCF through a simple application process. Individuals may contribute directly to a council's KCCF account and are eligible to claim a charitable deduction on their tax returns.

A donor-advised fund provides a valuable service to councils that have a significant amount of money in a bank account, or hold other liquid assets (e.g., a council that has received money from the proceeds of the sale of a home corporation facility, or a large bequest from a generous donor). Also, a council may wish to establish a dedicated account to receive donations for a specific Faith in Action program (e.g., American Wheelchair Mission, Ultrasound Initiative, etc.).

For assistance in creating a KCCF account or for more information please contact Dennis Gerber, President, Knights of Columbus Charitable Fund, at 475-227-6701 or visit Knightscharitable.org.

Alternatively, if a council has accumulated assets to be invested in support of a particular program (e.g., scholarships) or another appropriate long-term need, the decision as to how to invest should be guided by Catholic moral principles. As an organization of Catholic men, it is imperative that Knights of Columbus councils comply with the United States Conference of Catholic Bishops (USCCB) guidelines in their investment activities. There is no return on investment great enough to justify risking the good name and integrity of the Order by investing in ways that might violate Catholic teaching.

To the extent that a council wishes to invest accumulated funds, the council should retain a qualified and registered investment advisor who is knowledgeable about making investment decisions on behalf of charitable organizations and in accordance with Catholic moral principles. Knights of Columbus Asset Advisors (www.kofcassetadvisors.org) meets these qualifications.

Knights of Columbus Asset Advisors offers a suite of Catholic investment options, consistent with Catholic moral principles, that provides investors with access to the same institutional investment management expertise that guides the Supreme Council's multi-billion dollar portfolio for its own insurance and charitable programs. For assistance in designing an asset allocation program that meets the specific needs of a council, designated council representatives are invited to consult with Knights of Columbus Asset Advisors. Please contact Thom Duffy*, Vice President, Head of Investment Advisory Services and Sales Support, at (203) 752-4417 or thomas.duffy@kofc.org.

Invested funds should be held under the name and Tax Identification Number (also known as an Employer Identification Number or EIN) of the council, and only the officers identified in the bylaws may have signature authority over the account. The financial officers and trustees are responsible for keeping the members informed about how the funds are invested.

Regardless of how a council decides to invest or donate its funds, all disbursements and distributions must be made in accordance with the procedures set forth in Section 122(b) of the Laws of the Knights of Columbus.*

Knights of Columbus Council Insurance Program

Subordinate units are required to comply with all applicable diocesan insurance requirements to be eligible to meet or conduct Knights of Columbus programs, events, or activities on parish or diocesan property. Grand Knights should consult closely with pastors to ensure that the subordinate unit is compliant with all applicable diocesan insurance requirements. Each subordinate is responsible for securing and paying for appropriate insurance coverage and maintaining records of the same. The Supreme Council does not provide liability insurance coverage for subordinate unit. To the extent that a subordinate unit or one of its members incurs liability for an act or failure to act, that subordinate unit or member may not assign the liability to the Supreme Council, nor may it seek reimbursement for any expenditures associated with that liability. See Section 246 of the Laws of the Knights of Columbus.

The Supreme Council recognizes the need for adequate and affordable liability insurance to protect subordinate units from the risks associated with their programs, events, and activities. Accordingly, the Knights of Columbus has established a relationship with Lockton Affinity, LLC, in the United States, and Jones DesLauriers in Canada, to develop, offer, and service insurance policies with suitable coverages and liability limits for subordinate units in the United States and Canada. These are our preferred partners to assist subordinate units in securing liability insurance coverages that is designed to meet the broad range of liability risks most commonly associated with subordinate units of Knights of Columbus in the United States and Canada.

In the United States, Lockton Affinity is a subsidiary of Lockton Companies, the largest privately held commercial insurance broker in the world. Lockton Affinity has been providing insurance for fraternal organizations for more than 30 years and today serves more than 6,000 fraternal clients. Its experienced team of customer service representatives is dedicated to helping fraternal organizations such as the Knights of Columbus.

* *Thom Duffy is registered with Vigilant Distributors, LLC which is not affiliated with Knights of Columbus Asset Advisors LLC or its affiliates. This communication is provided for informational purposes only. Investing involves the risk of loss and investors should be prepared to bear potential losses. No portion of this commentary is to be construed as a solicitation to buy or sell a security or the provision of personalized investment, tax or legal advice. Knights of Columbus Asset Advisors is an SEC registered investment adviser that maintains a principal place of business in the State of Connecticut. For additional information about Knights of Columbus Asset Advisor's business operations, please consult the Firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov / www.adviserinfo.sec.gov. Knights of Columbus Asset Advisors, LLC, is a wholly-owned subsidiary of Knights of Columbus, the world's largest Catholic Lay Organization.*

All insurance is placed with insurance carriers rated "Excellent" or higher by A.M. Best. The Local Council Program offered by Lockton Affinity includes Commercial General Liability, host liquor liability, sexual abuse and molestation coverage and Director and Officers coverage. For more information or to get a quote visit: www.councilinsuranceprogram.com or contact Lockton Affinity at 1-800-496-0288 or CouncilInsurance@LocktonAffinity.com. Available coverages include:

- Property
- Liability
- Host Liquor Liability
- Hired and Non-Owned Auto
- Liquor Liability
- Workers Compensation
- Business Auto
- Employee Dishonesty
- Crime Coverage
- Special Events Coverage
- Umbrella Liability
- Sexual Abuse and Molestation

For more information, or for a free, no-obligation quote please contact Lockton Affinity at 1-800-496-0288. You may also contact them by email at CouncilInsurance@LocktonAffinity.com or visit them online at www.councilinsuranceprogram.com

In Canada, our preferred partner to assist subordinate units in obtaining liability insurance is Jones DesLauriers. Jones DesLauriers is a Navacord company with local offices across Canada. Liability insurance is critically important, as it protects not only Canadian subordinate units from claims, but also members who are themselves uninsured. Even when a lawsuit has no merit, it can take as long as six years for a case to be resolved in the court system; moreover, defending these claims would place a significant financial burden on subordinate units. Jones DesLauriers manages a liability insurance program that provides protection for Property, Crime, General Liability, including Abuse and Host Liquor Liability, and Directors & Officers (Board Liability) losses. Their products are priced competitively, and the coverages are generally superior to other insurance carriers. For more information or to get a quote, call 416-576-2344 or via email at davidg@jdmi.com. For more information, visit <https://www.jdmi.com>.

If you have questions relating to council governance, insurance, legal matters, or fraternal programs, please consult your state advocate. If he is not able to help you, he may request assistance from the Supreme Advocate's Office or the RGD for your jurisdiction. Alternatively, you may request assistance by sending an email to cget@kofc.org.

Protecting the Knights of Columbus Brand and Trademarks

The name, emblems, and logos ("marks") of the Order are registered trademarks belonging to the Knights of Columbus. Proper use of the Order's marks is a critical element of protecting the Knights of Columbus brand, which is one of the most important responsibilities of any Knights of Columbus officer.

State Council Branding

To strengthen and unify the Order's brand, the Supreme Council Headquarters has created standardized logos for each state council.

It is essential that state council logos be used on (1) state council websites, (2) social media homepages, and (3) official print and digital communications of the state council. These logos may also be used in a jurisdiction's membership promotional materials, on signage or promotions pertaining to state council events, business cards and correspondence from state leaders, as well as apparel for state council leaders. Additionally, state officers, district deputies, and state council chairmen and staff may also use these assets when they are acting in their official capacities. However, insurance agencies, local councils, and assemblies can not use the state council logos.

The horizontal logo is the standard state council logo arrangement and should be used on most stationery, signage, ads, and apparel.



**Knights of
Columbus®
Connecticut
State Council**



**Knights of
Columbus®
Connecticut
State Council**

In limited situations a given design may necessitate the use of the vertical arrangement of the logo. Use of the vertical format is limited to: single column ads, pull-up vertical banners, podium wraps, and some apparel. In all other cases, state councils should use the horizontal logo. Our approved vendors for supplies and apparel have these files and know to adhere to the proper use guidelines and policies governing the Knights of Columbus brand.

Please reach out to brand@kofc.org with any questions and we will be glad to assist you.



**Knights of
Columbus®
Connecticut
State Council**

Where and How

Use the online Supply Store to access state council logos, stationery, and ad templates.

- Sign into Officers Online.
- Click on the "Supplies Online" icon.
- Select the "Asset Library" and click on State Council Branding. Alternatively, search by your jurisdiction name in the search field.
- Review materials in each folder for access to all logo file formats, correspondence resources, membership/events ads, and more.

Use Knights Gear to order state council branded apparel.

- Go to knightsgear.com.
- State council officers, state membership and program directors, and executive secretaries will be given access to a sign-in only state council webpage, where they can place bulk orders for state council apparel from an approved catalog of items
- For questions on state council offerings on KnightsGear, call 1-833-695-4872 or email KnightsGear at Support@KnightsgearUSA.com.

DO

- Use the standardized state council logos in all public marketing of your state council.
- Use the new logos on letterhead, Knights Gear custom apparel, webpages, business cards, signage, and any official records.
- Follow the guidelines on www.kofc.org/brand regarding color and approved font usage when developing material.
- Ask for help by emailing brand@kofc.org if you cannot find the new materials or if you have any other questions.

DON'T

- Use the new logos on name badges for offices below the state level.
- Send the logos to unauthorized vendors to produce merchandise.
- Adjust or customize the approved logos.

Ordinary Fraternal Use

The Order has granted subordinate units (e.g., state and local councils, chapters and assemblies) a limited license to use the marks for ordinary fraternal, evangelical, and charitable purposes, which are defined as activities that:

- Increase public recognition of the Order, consistent with the Catholic mission and identity of the Knights of Columbus;
- Promote charitable, evangelical, fundraising, or civic activity, consistent with the Catholic mission and identity of the Knights of Columbus;
- Enhance the fraternal bond among members of a Subordinate Unit; or
- Cultivate goodwill among members of a Subordinate Unit and the parish(es) directly served by that Subordinate Unit.

Ordinary Fraternal Use includes the publications, advertisements, and correspondence used by the Subordinate Unit to promote the fraternal, evangelical, and charitable mission of the Knights of Columbus, such as:

- Flyers, signs, and other paper materials promoting fraternal, evangelical, or charitable events of the Subordinate Unit;
- Stationery (letterhead, envelopes, business cards, etc.);
- Websites (and other social media sites like Facebook® or Twitter®) and apps providing information and education (but NOT advertising for a third-party product or service, or links to the same);
- Forms and brochures;
- Newsletters;
- Annual reports.

Use of the marks to promote any private business interest, personal enterprise, political party, or political cause **never** constitutes “Ordinary Fraternal Use,” even if the activity is expected to generate proceeds that would be used for charitable purposes.

Ordinary Fraternal Use extends to and is limited by the geographic boundaries of the subordinate unit. For example, a state council may not use the Order’s marks on a fundraiser advertised in another state, unless all the state councils involved have agreed in advance and permission has been granted by the Supreme Secretary (supremesecretary@kofc.org).

In any case of Ordinary Fraternal Use, the subordinate unit is required to display its name, number (if applicable), and geographic location within close proximity to the marks, so as to make it clear that the activity is sponsored by the subordinate unit, and not the Supreme Council.

Ordinary Fraternal Use also includes a Subordinate Unit’s use and display of Knights of Columbus-branded apparel, banners, and merchandise. However, Ordinary Fraternal Use **does not permit a Subordinate Unit to produce and commission branded apparel, banners, and merchandise.**

Merchandise and Vendors

Only licensed vendors, those that receive permission from the Knights of Columbus Board of Directors, are permitted to produce, market, and sell items bearing those marks. Members and subordinate units are therefore expected to use authorized vendors. Purchasing branded goods from unauthorized vendors dilutes the strength of the K of C brand, and creates a risk that the marks would be used in a way that might damage the reputation of the Order.

The Order has established several authorized vendors to be the source of official K of C goods, including:

Knights Gear

www.knightsgear.com

For customized products, email custom@knightsgearusa.com

<https://skleprycerski.com> (Poland)

Knights Gear contributes a portion of online sales to Knights of Columbus Charities.

The English Company

www.kofcsupplies.com

Supplies Online

Available at Officers Online

If an authorized vendor is unable to provide what a council or assembly needs, a request may be submitted to nameandembleminquiries@kofc.org. Upon review, the Office of the Supreme Secretary may grant a one-time license to a third-party vendor for that item. Without a license, third-party vendors are not permitted to produce K of C merchandise. Knights of Columbus reserves the right to take legal action against third-party vendors producing branded goods without a license from the Board of Directors.

These branding policies are not currently well known to members in many jurisdictions. Your assistance and leadership as state officers is crucial in improving members' awareness of these important policies.

Councils Using Home Corporations

Subordinate councils are unincorporated associations holding charters from the Knights of Columbus or otherwise approved by the Board of Directors of the Knights of Columbus; they are subject to dissolution or merger according to the Order's laws. Subordinate councils have the discretion to choose a suitable location to conduct their activities in light of the mission and identity of the Knights of Columbus. The Supreme Council has strongly encouraged councils to meet in local parishes, in accord with the original vision of Blessed Michael McGivney. Today, most councils of the Knights of Columbus are parish-based.

In the past, individual members of some subordinate councils decided to form corporations outside the control of the Knights of Columbus for the purpose of buying real property and owning buildings where their councils could establish a "permanent home" to hold their meetings and events. These corporations came to be known as "home corporations." "Home corporation" is a generic term for what are variously known as "permanent homes," "home associations," "council halls," "Columbus Clubs," "KC Clubs," and "Knights of Columbus Clubs." Although home corporations are separate from the Knights of Columbus, their corporate purpose is to benefit the councils using their buildings for council meetings, programs, events, and activities. This purpose is usually expressed clearly in the corporation's organizational documents.

Home corporations are independent legal entities formed under the applicable laws of the jurisdictions in which members of subordinate councils reside. They are not subordinate units of the Knights of Columbus and are not subject to the *Charter, Constitution, and Laws* of the Order. The properties and buildings owned by home corporations are not owned, operated, or maintained by the Knights of Columbus. Individual home corporations, and not the Knights of Columbus, are solely responsible for all liabilities arising from the properties and the activities conducted there unrelated to subordinate councils of the Knights of Columbus.

Home corporations do not hold a charter from the Board of Directors, and are not owned, operated, or maintained by the Knights of Columbus. Therefore, these corporations are NOT authorized to use the trademarks of the Knights of Columbus in their legal corporate names or in any of their marketing or promotional materials. Instead, as an independent corporate entity, a home corporation must create and design its own, unique "brand" to promote and market itself.

Many home corporations have decided to operate side businesses to help pay taxes, utilities, insurance premiums, and other expenses arising from the maintenance of their property and building. Home Corporation side businesses often include rentals of the corporation's facilities to the general public. In such situations, the business of renting facilities is carried out by and for the corporation, not the Knights of Columbus. The Knights of Columbus does not authorize, endorse, or otherwise participate in business decisions relating to the rental of home corporation facilities. Furthermore, the Supreme Council does not receive any revenue from the rental of home corporation facilities.

A home corporation must avoid branding or marketing its facility and business in a manner that would confuse or mislead the public into thinking that the local Knights of Columbus council owns the corporation's property or its rental business. Many corporations have chosen names and marketing themes for their corporate name and business name that make sense in the context of the local community. For example:

- Local landmarks (e.g., Bunker Hill Hall),
- Local geographical features (e.g., Yellow Creek Club),
- Local history (e.g., Mayor Quimby Recreation Center),
- Catholic Historical Figures (e.g., Jean de la Valette Corporation)
- Street address/location (e.g., One Boardwalk Plaza Social Club),

Many other corporations have gone a step further and developed their own brand in connection with their facility rental business. The corporation's "brand" must make clear to the general public that the corporation's rental business, as well as any other related business connected with the corporation, belongs exclusively to the corporation, and is not a fraternal or charitable program of the Knights of Columbus. To avoid confusion, home corporations should NOT use names such as "KC Hall," "Knights Hall," and other similar terms. Home corporations may NOT use "Knights of Columbus" or "K of C" in their official corporate name. If a home corporation's current name could cause confusion as to whether it is owned or controlled by Knights of Columbus, the corporation must take the necessary legal steps to effect a change in its corporate name.

Those who are responsible for managing rentals of home corporation facilities on behalf of the home corporation, especially if members of the Knights of Columbus, should carefully screen prospective renters to guard against various risks that could arise because of the home corporation's rental of its facilities to third-parties. These risks include trademark infringement, scandal, reputational damage, depreciation of goodwill, and civil liability to the council and to the Knights of Columbus. To protect the Order's valuable trademarks, reputation, and goodwill, home corporation rental managers should ask prospective renters to provide in writing, at a minimum, the following information:

- how the renter intends to use the corporation's facility in connection with the renter's event;
- Suitable liability insurance if applicable;
- a copy of any advertisements, invitations, and other promotional materials to be used to promote the renter's event;
- a copy of any advertisements, invitations, or other promotional materials used by the renter from past events at other locations;
- whether the renter intends to promote the renter's event on social media, the internet, newspapers or in other media (television, radio, etc.);
- the names of vendors and type(s) of entertainment that will be featured at the event;
- whether alcohol will be served and to whom; and
- the amount of the admittance fee, if any.

Above all, those responsible for renting home corporation facilities have the duty of notifying the renter that the renter is strictly prohibited from using any of the trademarks, logos, name, and emblems of the Knights of Columbus to promote the renter's proposed use of the facility. The "Addendum To Event Rental Agreement" listed as Schedule 1, found on page 41 of the *Handbook For Councils Using Home Corporation Facilities*, should be used in connection with all rentals.

State deputies frequently receive inquiries from grand knights relating to home corporation facility rentals to third-parties for events and activities that affect the Order's reputation. If a council is concerned about a particular rental of a home corporation facility, the grand knight should, before taking any action, refer the concern to the State Deputy and the Supreme Advocate's Office for review and consultation.

Home corporations choosing to rent their facilities to the general public are subject to federal, state, and local laws and regulations governing public accommodations. Failure to observe these laws and regulations may expose home corporations to significant penalties and to lawsuits. Accordingly, home corporation rental managers must ensure compliance with all applicable laws and regulations by consulting with a knowledgeable attorney.

Officers' Online provides more information concerning home corporations. All questions concerning this matter should be directed to the Council Governance Excellence Team at CGET@kofc.org or 203-752-4017.

TIMELINE – WHAT TO DO AND WHEN

Many of the duties of a State Deputy are of a time-sensitive nature. The following timeline focuses on what must be done and when.

Upon Election

The State Deputy should:

1. Ensure that professional-quality photos in color (head and shoulder shots) are taken of yourself. A color photo of the State Deputy with his completed biographical information form must be received by the editor of *Columbia* magazine as soon as possible after election and no later than June 1st. These should

be sent via overnight delivery or e-mailed to columbia@kofc.org. Re-elected state deputies may submit a new photo and updated biographical form if needed.

- Ensure that the photographer uses a neutral gray background
- You should wear a dark-colored suit with a white shirt and a tie
- Wear the Emblem of the Order lapel pin only
- No medal of office or name badge should be worn
- (It is a good idea to have photos of the other state officers and supreme convention delegates on hand for the use of the state public relations director and for state archives.)

2. Request the incumbent publicity chairman to submit a press release and photos announcing election results to all appropriate local and diocesan newspapers.
3. Ensure that the incumbent state secretary immediately sends the *Notice of Election of State Council Officers* form (#111) to the Supreme Secretary. This form includes information on the next state council meeting as well.
4. Plan to attend the Organizational Meeting of State Deputies in June in New Haven. Your wife is encouraged to attend, and your children are welcome as well.
5. Confer with incumbent State Deputy or immediate Past State Deputy and delegates regarding plans to attend the Supreme Convention.
6. Schedule an “administration changeover” meeting with the outgoing State Deputy as well as the current and newly-elected state officers. This should be held by July 1st or soon thereafter.
7. Schedule a “Membership Planning Meeting” with the membership director, NCD chairman, ceremonials chairman, program director, publicity chairman, general agent(s) and other key personnel to plan for the summer organizational meeting.
8. Confer with the outgoing State Deputy and the newly-elected state officers for recommendations for State Chaplain appointment. The request is made to the bishop of the nominee’s diocese. The bishop appoints the chaplain.
9. Arrange for printing of a new state council directory — including bishop(s), insurance agents, Assembly officers, and state service program personnel (include wives’ names). Charge the state secretary-elect with this responsibility. When printed, send six copies to Fraternal Mission Department.
10. Contact your RGD to discuss ideas on the agenda for the summer organizational meeting. The agenda must be approved by your RGD in order to be submitted for home office approval.
11. Make hotel or other arrangements for the jurisdiction’s summer organizational meeting to be held between June and July.
12. Newly-elected state deputies should consult and check with the outgoing State Deputy, regarding invitations to the Supreme Council meeting for bishops in the jurisdiction. (Note: If not done, notify Supreme immediately.)
13. If needed, order state council stationery from Supplies Online.

During June

1. Request approval from the Supreme Knight for the summer organizational meeting for district deputies. Provide him with the date of the meeting, its location, the room rate and the proposed agenda.
2. Schedule the installation of state officers and district deputies (this should not be done at the state convention).
3. Make sure the state secretary has forwarded all adopted resolutions from the convention to the Supreme Secretary by June 15th.
4. Submit the plan of districting in the jurisdiction to the Supreme Knight for approval.
5. Start planning for the State Organizational Meeting of District Deputies, the goal of which is to adequately train district deputies. Meet with the RGD to discuss ideas and suggestions on implementing plans to achieve the state council’s membership goals, new council development goals, star council goals and fraternal objectives.
6. Meet with the state ceremonials chairman and develop a communication plan to collect information on upcoming Exemplifications of Charity, Unity and Fraternity and publicize the dates to councils.

Throughout the year, identify geographical areas that require additional exemplifications and urge council and district exemplification teams to support the need.

7. Send a reminder to grand knights that if they have not yet done so they should submit the *Report of Officers Chosen for the Term* (#185) to the Supreme Council office immediately. Encourage use of the Member Management application to submit the data as soon as possible.
8. Request the help of the state membership director, the state program director, or the council report forms chairman to follow up with grand knights regarding submission of the *Service Program Personnel Report* (#365), which must be received by the Supreme Council by June 30th. Encourage the use of the Member Management application to submit the data as soon as possible.

By July 1

1. Forward all communications and delegate credentials for the Supreme Council Meeting to delegates. Make certain delegates and alternates can attend the meeting; if they are unable to attend, appoint any eligible member representing the insurance and associate categories.
2. Nominate someone to “be in charge” of the jurisdiction while the State Deputy is at the Supreme Council Meeting.
3. Forward all requests for tickets for guests at the Supreme Council Meeting to the Supreme Secretary. He will determine the seating arrangements for the States Dinner based on the jurisdiction’s “Circle of Honor” standing during the previous fraternal year.

By July 10

1. Be certain the State Secretary serving at the time of the state council meeting prepares proceedings, sends copies to delegates and a copy to the Supreme Secretary (these proceedings should include reports of standing committees).

By September 15

1. Ensure that all district deputies have submitted a #944 survey for each council in your jurisdiction.

By October 1

1. Expect the announcement of the date and site of the Supreme mid-year meeting.
2. Request the Supreme Knight’s approval for the state mid-year membership meeting of district deputies including the date, site, room-rate and proposed agenda.
3. The meeting is to be held between November and January.
4. Consult with your RGD to discuss ideas and the agenda for the mid-year membership meeting of district deputies.

By November 1

1. Be certain the Supreme Secretary is informed of the location, date, and hotel of upcoming state council meeting (which must be held within the geographical boundaries of the jurisdiction).
2. Review results of District Deputy reports of council health and address problems identified therein.

By December 1

1. Meet with the state ceremonials chairman and review the communication plan to make sure upcoming exemplification dates are being publicized. Address exemplification needs by recognizing geographical areas that are not recruiting. Assign council and district exemplification teams to fill the need.

By January 15

1. Check on the state program director’s or report forms chairman’s progress with encouraging local councils, chapters, and assemblies to submit the *Annual Survey of Fraternal Activity* (#1728); be certain the state secretary has filed this report for the state council by January 31st. This demands the highest priority.

2. Check on the state program director's or report forms chairman's progress with local councils regarding the Special Olympics reporting through the online *Fraternal Programs Report Form* (#10784) due January 31. Council participation will be tabulated to determine eligibility for annual grants to the State Special Olympics programs.
3. Have the state program director promote the importance of the Star Council Award.

By February 1

1. Write the Supreme Knight requesting that the supreme chaplain invite the bishops chosen from the jurisdiction to the supreme convention. (An invitation will be extended only if the state council pays for the transportation of the bishops. The Supreme Council pays for hotel, states dinner ticket, all registration fees and sends a stipend for participation at the close of the meeting).
2. Plan the state council meeting with the host council representatives. The state council controls hotel rooms, arrangements, speaking programs and social function fees. If possible, schedule an exemplification at the convention with candidates from the immediate area.

By February 15

1. For the state convention, appoint all state council standing committee chairs (should be district deputies) and members (should be grand knights).
2. Appoint a necrology committee for the Memorial Mass at the state convention. (Suggest that names of deceased brothers be printed in booklet form listing titles of district deputies and state council personnel.) Send booklets to councils for delivery to families of the deceased.

By April 30

1. Ensure Family of the Year, Service Program, and Blessed Michael McGivney winners are submitted to Supreme.

[STATE COUNCIL HEADER]

FOR IMMEDIATE RELEASE
MONTH DAY, YEAR
Contact: **EMAIL ADDRESS**

[State Deputy] [Elected/Re-Elected] State Deputy of [State] Knights of Columbus

[State Deputy Last Name] has served the Knights in his parish and community since [Year of Joining KofC]

[State Convention City, State] — Knights of Columbus delegates from across [STATE] today elected [State Deputy] as State Deputy, the organization's highest state-level position, at its annual convention in [CITY]. In his capacity as State Deputy, [State Deputy First Name] will oversee [Number of Councils in State] Knights of Columbus councils throughout the state which represent [Number of Knights in State] Knights and their families. The term of state deputy lasts from July 1 until June 30.

[Short Quote from State Deputy regarding his gratitude for the new position, his vision for the Knights in his state [e.g., grow the organization and strength the faith of Catholic men] and any other plans to ensure a bright future for the Knights in the Jurisdiction.]

[Include 2-3 sentences with the KofC bio of the re/elected State Deputy highlighting where and when he joined the Order, positions held at the state level and local positions held].

[Include 2-3 sentences with the professional bio of the re/elected State Deputy highlighting his area of study in college and his current job].

[Include 1-2 sentences with the family bio of the re/elected State Deputy highlighting wife, years married and any kids and grandkids].

About the [STATE] Knights of Columbus

In 1882, Blessed Michael McGivney, a young parish priest in New Haven, Connecticut, founded the Knights of Columbus to serve the needs of a largely immigrant Catholic community. What began as a small fraternal benefit society has since grown into the world's premier lay Catholic men's organization, with more than 2 million members in over 16,600 local councils. **STATE SPECIFIC INFO – include 2-3 sentences with state-specific statistics, including when the state council was established, number of members, latest statewide service hours, major projects, website, social media platforms.** Based on the founding principles of charity, unity and fraternity, the Knights of Columbus is committed to strengthening Catholic families and parishes, and to practicing faith in action through service to all in need. To learn more or to join the Knights of Columbus, please visit kofc.org/join.

