

Knights of Columbus

Massachusetts State Council

Membership Handbook



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Preface

Much has been accomplished since Father McGivney met with a small group of men in the basement of St. Mary's Church in 1882. We continue to be leaders paving the way into the future. The number of members and Councils continue to grow because of your efforts. Growth is the key to our survival and our future leadership. With each member's efforts to Recruit, Retain, and Reclaim we will succeed in keeping the dream of Father McGivney alive. Remember: If not ME, then WHO!

Purpose

The purpose of this handbook is to provide District Deputies, Grand Knights, Council Officers and Council Membership Teams with a guide containing valuable information to aid them in their recruitment and retention efforts.

Although this handbook provides key personnel with most of the tools required, a successful Council Membership Program is directly dependent on the leadership of the Grand Knight and his chair officers, the initiatives of the Council Membership Team, and the support and active participation of every member of each and every Council.

Objective

For Massachusetts to attain number 'ONE' in the Order with strong State Membership leadership and support to its subordinate Councils.

MEMBERSHIP TEAM

The membership team is comprised of the Supreme Council, State Deputy, State Board, State Membership Team, District Deputy, the Council Grand Knight, and the Council Membership Team.

Supreme Council

Supreme Council establishes the laws and membership goals for all Councils of the Order, thus promoting its continuous growth.

State Deputy / State Board

State Deputy who appoints District Deputies and a State Membership Team to support subordinate Councils in their membership efforts to reach the State's membership goal.

State Membership Team

Consists of the Membership Director, Regional Membership Directors, Regional Recruitment, Retention, Retention Chairmen, New Council Development Chairman and Teams, and Financial Secretary Advisory Group.

Grand Knight

Each Council Grand Knight should establish membership goals shortly after being elected and implement these goals at the first Council meeting in July. He should identify a membership team that will serve to meet the goals necessary to continue the growth of that Council. These appointments of the membership team should begin on July 1st and their efforts should not stop until June 30. Finally, schedule and conduct Admission Degrees early and frequently. Each Council should schedule and conduct a Admission Degree during the month of July.

Council Membership Team

Council Membership Team appointed by Grand Knight is comprised of:

- Membership Director (preferably a PGK)
- Recruitment Committee Chairman
- Admissions Committee Chairman (and a committee of seven members)
- Retention Committee Chairman (Deputy Grand Knight, with the Trustees and Field Agent as members)
- Financial Secretary

Sponsor

Sponsor is the new member's proposer.

RESPONSIBILITIES

State Deputy

To establish the State Goals and conditions to support subordinate Council's efforts to achieve those goals for continuous membership growth within the State.

State Membership Team

These men provide assistance to District Deputies, subordinate Councils and their membership teams in the area of membership. They provide additional guidance and support to the District Deputy ensuring the district's membership goals are realized. Their basic focus is on the overall welfare of the continued growth of the State membership by supporting established goals and other membership type programs within the State.

District Deputy

Selected by the State Deputy and Approved by the Supreme Knight, he acts on their behalf to support his District's Councils. One of his goals is to assist each Council to meet or exceed its membership goals. It is his job to support each Council in its efforts to build and maintain a successful membership program. He should advise and train each Council with the proper procedures and responsibilities and give direct support to any Council needing that support. He should ensure that the proper membership team infrastructure is in place. Instruct each team member (i.e. Membership Director, Admissions Committee, Recruitment Committee, and the Retention Committee) in the proper knowledge of their roles and responsibilities so they are understood. He should provide explicit instructions and guidance and NOT assume that they know what they are doing. Any council in additional need of assistance may contact the Regional Membership Team, which will provide whatever assistance is needed. This is the first critical step in the proper development of a "repeatable" process to recruit, retain and reclaim members. If you cannot repeat the process your program is weak and greatly increases the potential for failure in that Council's membership program.

Grand Knight

Is the vital KEY to the success of the Council and State membership program! It is the Grand Knight's responsibility to ensure he appoints by JULY 1st a Membership Director, Admissions Committee, Recruitment Committee, and Retention Committee. All members of these committees should be properly informed, trained, and receive the membership material provided by Supreme to the Council's Financial Secretary and given to the newly elected Grand Knight. It is also the Grand Knight's responsibility to keep his District Deputy informed as to his goals, committee assignments, Council programs, the results of these programs, and any problem areas requiring assistance. This communication with the District Deputy should be done monthly at a minimum.

COUNCIL MEMBERSHIP TEAM ROLES AND RESPONSIBILITIES

Membership Director

- Should Be a Council officer like a Past Grand Knight or a person with leadership abilities and the understanding of a salesman
- Foster high standards, enforce establish procedures from Supreme, State Council, and his Council in the area of membership
- Provide the membership team a training program to ensure that all team members know how to be effective in their responsibilities (an outline is provided in the appendices for your consideration) and know the proper procedures of the membership program
- Coordinate Admission Degree dates with Grand Knight
- Maintain a current list of Formation and Third Degree dates in the local area to notify candidates in a timely manner and to coordinate this information with the Financial Secretary to ensure that eligible members advance to the next higher degree as soon as possible
- Strongly encourage sponsors to accompany candidates to **all** degrees
- Ensure recruiting teams are informed of dates the admission team will meet and dates of all degrees
- Assist the Grand Knight in coordinating requests to the District Deputy for Second Degree dates
- Publicize and supervise VIP and Shining Knight incentives and awards for active sponsors and any membership incentive program

Recruitment Committee Chairman

- Should be a Past Grand Knight
- Establish a program in support of the Council's recruitment goals
- Assist sponsors with prospective member initiatives
- Assist Financial Secretary and sponsors with preparing prospective members for the Admission Degree
- Strongly encourage sponsors to accompany candidates to **all** Degrees.
- In cooperation with sponsors and the Council Program Director, get new members involved in Council activities and committees
- Establish and provide notice via Council newsletter, email, and personal telephone calls to members providing information on upcoming dates and places for recruitment drives and ask for their support
- Plan Open House and Membership Night events EARLY in the fraternal year and often to reach Council goals early in the fraternal year
- Supervise invitation of prospective members and Two-on-One Recruitment Committees

- Retention Committee Chairman
 - By Supremes recommendation should be the Council's Deputy Grand Knight
 - Have as members the Council Trustees at a minimum.
 - Work with assigned Field Agent who may know of other issues because of his contacts
 - Develop and execute a retention program that seeks to contact members who no longer attend meetings or functions. Use sponsors to assist in this process. Seek out reasons why they are not attending and advise them of upcoming functions and events and ask them to participate or assist in these programs to support the Council. Note: Do not hesitate to seek assistance from the District Deputy, State Membership Director, State Regional Directors, State Retention Chairman, Field Agent or General Agent.
 - Promoting all retention programs sponsored by Supreme and State Councils
 - Helping promote Council activities which encourage and foster fraternity among ALL members and their families
 - Meeting frequently with Retention Committee members to review status of membership contacts and to assess suggestions and programs for resolving membership and/or retention problems
 - Ensuring that all committee members are properly instructed on the information required to intelligently discuss problem areas with Council officers and members
 - Working with the Financial Secretary to identify all Council members in arrears and in danger of being suspended, or who have requested a final withdrawal card.
 - Contacting Sponsors to call Council members in arrears or in danger of being suspended.
 - Post list of possible suspensions so that membership can contact member.
 - Coordinating calls to members having received a Second Notice with the FS and Trustees
 - When possible, arranging for personal visits to each member in danger of suspension by a two-man Retention Team
- Note: Telephone contacts or letters are last resorts and less effective than personal visits. After contacting a member and determining that retention does not appear possible, encouraging withdrawal as the preferred alternative to a member's suspension
- Establish a program in support of the Council's retention goals
 - Advise the Grand Knight of reasons causing members to be "inactive/absent" with recommendations to rectify
 - Prepare information to inform all members subject to suspension of alternatives to being dropped (alternatives are to be with approval of the Grand Knight)

Admissions Committee Chairman

- Preferably a PGK and at least seven members (e.g. Membership Director, Recruitment Chairman, Trustees, Field Agent, and others to make up seven)
- Be responsible to arrange with the members of the committee appropriate meeting dates and times to speak with prospective candidates about their intentions and to inform the candidates about the functions of your local Councils programs and activities
- Coordinate with the Membership Director and Recruitment Chairman scheduled admission committee meeting dates and times to meet with prospective candidates
- Meet with prospective candidates using the Admissions Committee Inquiries Guide provided by Supreme Council Office on simple questions to ask prospective candidates
- Ensure the candidate understands who we are, your Council's activities in the Church, Community and other Areas.

- Advise the candidate of Council dues and Initiation fees and the importance of communicating with the Financial Secretary when any personal data (i.e. address, phone, etc) changes
- Inform the candidate of the many benefits of the order and of the importance of his admission to any Council in the order with his traveling card and paid up dues
- If a candidate is discovered as NOT being in union with the Holy See, your Council Chaplain or Parish Pastor will provide you with the status of the candidate in question. You must abide by his response
- Present the committee's decision and recommendation on each candidate for election
- Ensure the candidate's sponsor is in attendance and inform the sponsor of his responsibilities to take the candidate to degrees and assist him in getting involved in the many programs in your Council

Financial Secretary

- Verify Council roster for accuracy and maintains current addresses on members
- Meet with applicant after admissions committee to ensure paperwork is complete and that fees and dues are paid
- Updates membership and degree information notifying Supreme of changes
- Provides Membership Director with name, phone number, and address of eligible candidates for advancement to meet District and State scheduled degrees
- Prepares membership cards for those candidates advancing to the next higher degree and provides them to the Grand Knight for presentation to the candidate at the degree
- Coordinates early with Grand Knight and Retention Committee Chairman concerning members in arrears
- Promotes "New Member" Insurance Plan by having new candidates read the reverse side of the Form 100

Sponsor

- Is the candidates proposer (i.e. the person who asked the candidate to join the order and signed the form 100) and the KEY LINK to a successful recruitment and retention process. Without a sponsor's support a new member can wrongly feel rejected or unaccepted and quickly become a retention problem
- Introduce candidate to Admission Committee and indicate why he should be accepted as a member of the Council
- Take the candidate to all degrees
- Introduce the new member to the current membership, the Financial Secretary and Grand Knight at a minimum
- Get him active and involved in Council programs.

Appendix A -- A Membership Plan for Grand Knights

Getting Started

1. Immediately after your election (conducted between May 15 and June 15), consult with your predecessor on lessons learned from his membership plan of action. You should take time to discuss your choices for key positions to be filled on the Council's Membership Team (consisting of: Membership Director, Admissions Committee, Recruitment Committee, and Retention Committee).
2. Discuss with the Council Financial Secretary the current membership status to obtain a clear picture of the Council's membership status. Some things to ask are:
 - a. Number of current members and the total number as of July 1st
 - b. Number of Honorary and Honorary Life Members and who will become eligible during your year in office
 - c. Number of candidates waiting for Admission Degree
 - d. Number of members who are in arrears in paying dues and how many months
 - e. Number of members eligible for advancement to Formation Degree
 - f. Number of members eligible for advancement to Knighting Degree
3. Based on this July 1st total number of members Supreme shows on record you can now multiply that figure by 7%, which establishes your Council's minimum quota and goal for new members for the fraternal year. You should add to that quota an additional percentage that is realistic and achievable, making that goal your target for the new fraternal year. Announce this target goal and the date you expect to achieve that goal at your first council meeting and charge your membership team to begin work on achieving that goal. Challenge the team and members (these men are your SPONSORS) to make the Council active by recruiting and exemplifying at least one new member in July.
4. To keep the team on track, establish a monthly goal derived by dividing your quota/target goal by 12 months. This will cover any problem months when recruitment was below your target or to use to push your final membership over target. Establish an early date to reach that goal and remind all where you stand each month.
5. Establish with your Membership Director early and frequent First Degree dates, membership drives, open houses, and fraternal benefits presentations to promote the recruitment efforts of your plan.
6. Contact the assigned Field Agent for your Council and ask him to be a member of your retention committee. Provide him with your membership plan so that he can strive to help you achieve your insurance goal in early enough time to counter any member who may surrendering their policy.
7. Commit to attend any degree where one of your Council's candidates will be in attendance. Always take a candidate to his degrees; NEVER let them attend alone!
8. Monthly via your meetings and newsletters let the membership know exactly where you stand on your goal and identify your new candidates in that forum so the membership can get to know this new member and his family.
9. Promote and announce membership awards, recognitions, and achievements at meetings and in newsletters. Such recognition programs are the VIP and Shining Knight Award.

Simple Check List to Reach Council Goal

Date Completed	Description
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Elected as next Grand Knight. Spoke with predecessor about his membership program, my plans, and my membership team appointments.

Talked to Financial Secretary and obtained the following numbers:

- _____ Current Membership Total
- _____ Membership Totals
- _____ Eligible Honorary/Honorary Life during new year
- _____ Candidates waiting for Admission degree
- _____ Candidates waiting for Formation degree
- _____ Candidates waiting for Knighting degree
- _____ Members in Arrears of Dues – 3 months
- _____ Members in Arrears of Dues – 6 months
- _____ Members in Arrears of Dues – 9 months
- _____ Members in Arrears of Dues – 12 months
- _____ Members in Arrears of Dues – 18 months
- _____ Members in Arrears of Dues – greater than 18 months

Established Councils Goal for New Year.

****(JULY)**

- _____ Council goal (July 1st number * .07 + additional)
- _____ Monthly goal (Council goal / 12 months) at minimum
- _____ Date Council ACTIVE (Exemplify at least one new member)
- _____ Date to Achieve Council Goal

Contacted and appointed the following membership team.

- _____ Membership Director
- _____ Admissions Committee Chair (PGK) and members
- _____ Recruitment Committee Chair and members
- _____ Retention Committee Chair (DGK) and members

Established Admission Degree dates to meet or exceed Council membership goals.

<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>
<u>November</u>	<u>December</u>	<u>January</u>	<u>February</u>
<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>

Contacted Field Agent assigned to Council and communicated Councils membership plan and Admission Degree dates. Asked him to be member of retention committee and to schedule Fraternal Benefits Night presentations.

Appendix B -- Successful Recruitment Program

Remember we are looking for **QUALITY members**. Each Council member has a responsibility to recruit. The qualifications for membership in the Knights of Columbus and the procedures pertaining to admitting new members, reactivation and reinstatement of previous members, and the transfer of members are covered in the Laws of the Order. They can also be found in the "Grand Knight's Handbook" and the Financial Secretary Handbook.

Eleven Steps To Success

STEP #1: Establish And Attain Council Goals And Quotas

- a) The Grand Knight should set a goal of 7% net gain in membership and 2.5% gain in insurance members (as minimums).
- b) Set goals to attain Star Council status and the Century Club Award. The latter, requiring a net gain of 100 members, may seem out of reach yet the majority of Councils have the capability and resources to meet this goal.

STEP #2: Organize The Council's Recruitment Campaign

Look around the Council and select and train if necessary, recruiters to serve on the Membership Committee. Pick those men who are enthusiastic, motivated, competitive, and know the Order. Arm them with the informational and promotional materials from the Supreme Council office so they will be well prepared and convinced of the advantages and benefits the Order offers to any man and his family.

- a) Implement membership recruitment programs sponsored by the State and Supreme Councils.
- b) Seek the cooperation of Pastors in the membership recruitment program. They may be able to suggest parishioners who would be prospects for membership. Also, try to schedule membership drives at the convenience of the parish by cooperative planning early in the Fraternal Year.
- c) Sponsor an "Information Program" for junior and seniors in high schools and the local parish and parochial high schools. Obtain approval and seek the assistance of the Pastor and school principal in the promotion of the program.
- d) Establish contact programs with high school and college graduates by sending them "Congratulations" cards (#938), and including your name as Grand Knight, the name of the Council, and contact phone numbers.
- e) Contact the local Knights of Columbus Field Agent and General Agent to help the Council plan recruitment programs.
- f) Sponsor incentive programs for recruiters in the Council, such as the Supreme Council's "VIP" Club and the State Council's "SHINING KNIGHT" Award. Inform members about the VIP Club; give each member the "VIP" Club rules flyer (#860). Recognize individual members when they reach various recruitment levels in special open meeting with family members present. Supreme keeps account of the members recruited and when the next level is achieved you will receive a certificate for that level. The "Shining Knight" Award is explained further in the Insurance Promotion Section of this handbook. The Grand Knight should use his own initiative to create a specific Council recognition program or programs to
- g) reward members bringing in new members -- let them know their efforts are noticed.
- h) Schedule frequent Admission-degree exemplifications.

STEP #3: Set Up Individual Recruiting Teams

- a) Train and educate the members of the Council on the working of the Order. This will better prepare members to recruit new members. Special audiovisual aids are available from the Supreme Council for use in training recruiters. Urge the Council's most successful recruiters to share some of their secrets.
- b) Ask the Field Agent to serve as an instructor. His knowledge of professional salesmanship techniques is very helpful. Ask him to conduct seminars on recruitment strategy for Council members.
- c) Stress "Two-on-One" recruitment. Teams of two recruiters make a more lasting impression on a prospect, suggest the fraternal nature of the Order, and can present the Knights of Columbus story more thoroughly than one member alone.
- d) Encourage the use of the Membership Recruitment Flip Chart (#889A) by team members when they visit a prospect and his family.
- e) Provide each recruiter with a copy of "Getting That Application Signed" (#922), the wallet-sized Flip Chart (#2041) and other materials available from the Supreme Council Supply Department.

STEP #4: Train Recruiters

- a) Obtain recruiting films from Supreme:
 - "Sign 'em up"
 - "Nobody Asked Me"
 - "Two-On-One"
- b) Invite former recruiters to share their experiences with the new team
- c) Invite the Field Agent to share his experiences on how he obtains a signature
- d) Order/review promotional materials from Supreme:
 - Recruitment Flip Chart and Binder (form 889 and 889A)
 - "Did You Know?" flyer (#1267)
 - Family Fraternal Benefits flyer (#2761)
 - Member/Spouse Fraternal Benefits flyer (#2773)

STEP #5: Develop Prospect Lists

NOTE - prospect lists may be developed during membership drives, from prospect cards posted in the church (with the Pastor's permission), or from two Supreme printouts: "Former and Inactive Knights residing in Massachusetts" and "Inactive Insurance members residing in Massachusetts". These lists are printed each year and distributed through the Massachusetts State Council.

- a) Use the prospect cards (#921 and #921A) available from the Supreme Council for soliciting prospects. Use the information to form an ongoing prospect list for recruiters to follow-up.
- b) Impress on recruiters that prospects can be relatives, friends, co-workers, from all walks of life, virtually any Catholic man you talk to (requirements - 18 years old, and a practical Catholic).
- c) Review the list of high school graduates, college students, and former Columbian Squires.
- d) Use the list of prospects to send invitations for "Open House", "Membership Night", and Council activities. Make the prospect feel welcome and let him know what the Knights and the Council are about.

STEP #6: Start Team Recruiting

- a) Divide your prospect list into assignments for a number of recruiting teams.
- b) Challenge the teams to see who can recruit the most prospects.
- c) Supply each team with ample membership documents and promotional materials that explain the Order.
- d) Have frequent meetings with the recruiting teams to review their progress and assign new prospects.

STEP #7: Visit Prospective Members Personally

- a) Personal recruiting has proven to be the best method. Arrange for the visit beforehand and be punctual. Dress neatly, wear your Knights of Columbus membership pin and promote the Order's positive image.
- b) The Knights of Columbus is a family organization; invite the prospective member's entire family to hear the presentation.
- c) Although the Order appeals to different prospects for different reasons, it's the opportunities that your Council offers that will be most appealing. Offer only what you can provide - stress current programs and activities of the Council that will appeal to the prospect and his family.
- d) Tell the prospect what makes YOU and your family proud to be a part of the Knights of Columbus.

STEP #8: Signing The Prospect

- a) After you've told the Knights of Columbus story and answered all questions, ask the prospect to join.
- b) Have a Form #100 ready and fill it out then -- don't delay when he is ready.
- c) Be ready to accept his check to cover initiation fees and dues. Know what these are BEFORE calling on a prospective member.
- d) Know dates of degrees and Council events and activities -- invite the member and his family and let them know they are a welcome addition.
- e) Inform the Recruitment Chairman and the Financial Secretary that you have a candidate for the Admission Degree.
- f) Schedule candidate to meet with the Admissions Committee as soon as possible and have the candidate's sponsor attend the meeting also.
- g) Let the candidate know you are proud to be his sponsor and you will assist him in meeting other Council members and taking his degrees.

STEP #9: Ensure Prompt Exemplification And Degree Advancements

- a) Schedule frequent Admission Degrees; don't make the candidate wait too long for his exemplification. Remember, the Admission Degree can be exemplified for as few as one or two men. Initiate new members fast and often.
- b) Ensure that sponsors accompany their prospective members and introduce them when they appear before the Admission Committee.
- c) Process all prospective members or candidates through the Admission Committee. Make certain that all completed membership documents are forwarded to the Supreme Council office immediately following exemplification of the Admission Degree.
- d) In coordination with the District Deputy, prepare new members for their Formation and Knighting Degrees. Again, do not delay a member from advancing degrees just to have a

bigger number of candidates at a later date. If new members have to wait weeks or months to take degrees, they may lose interest.

STEP #10: Ensure Sponsors Complete Their Responsibilities

- a) Ensure that sponsors accompany their candidates to ALL DEGREES.
- b) The sponsor should encourage a new member to join one or more committees and actively participate with him in Council activities. It is the sponsor's responsibility to see that "HIS" new member is introduced to Council members, is assigned to a committee and becomes actively involved in the Council.
- c) It is the sponsor's responsibility to see that the new member is welcomed and introduced.

STEP #11: Recruit Another Member

After the team has signed a prospect, go back to the prospect list and contact the next prospective member. As new members are welcomed they add to the expanse of the recruitment team. If the new member and his family enjoy the Knights and tell their friends, half the job of recruiting those friends is already accomplished. With each success comes more confidence and more ability, and recruiting another member comes that much easier.

Follow these eleven steps and your Council will succeed in "Discovering" more and more Catholic men and their families. Furthermore, the Order and YOUR Council will grow. New members are the Life of the Order. As leaders recruit new Knights as an example to them, reward members that bring in new Knights, and have your name at the top of the recruiter's list.

There is a constant call to action, involvement and commitment. As Knights, it is our responsibility to answer this call from our Church, community, our fellowmen and their families. Yet, if the Council is to respond to the specific needs or problems which face its parish or community, then Council must be fully equipped with sufficient manpower and the knowledge of available programs. There are many things that can be done to make a Council better. Enlist new membership to join in working to fight abortion, eliminate poverty, drugs and pornography. Return former members, and their families, to active status and seek their assistance in aiding people with intellectual disabilities or handicaps, or in helping to conduct Council programs of ecumenism, fraternalism or brotherhood. Assist members in realizing the many benefits of Knights of Columbus insurance and help new members discover the real meaning of the Knights of Columbus.

One of our goals must be to let prospects and their families know that we are deeply committed in service to our Church and communities. Each year our service program activities generate increasing amounts of volunteer time and charitable donations in the service of others. This is something we do joyfully. Our membership now numbers over 1.6 million men, plus their families, and is still growing. What is really important is that all of these efforts come from what each individual member and Council is able to accomplish in their community. That is what's really critical, and what must be conveyed to prospects.