

Knights of Columbus



People With Intellectual Disabilities Program Guide 2019

People With Intellectual Disabilities
Program Guide - 2019

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People With Intellectual Disabilities
Program Guide - 2019

Table of Contents

45th Annual Arizona Drive for People With Intellectual Disabilities	4
Introduction	4
History	4
Purpose	4
Eligibility of Charities.....	4
Special Olympics Partnership.....	5
Posters and Materials	5
Quick Guide for Running a PWID Drive.....	5
Program Guide	6
Preparation	6
Preparation (Cont.)	7
Conducting the Drive	7
Conducting the Drive (Cont.)	8
PWID Reporting.....	8
Expense & Check Request Form Preparation	8
Submission of Funds	9
Dispersion of Funds.....	10
District Deputies' Responsibilities	10
Processing of Expense & Check Request Forms	10
Code of Conduct.....	11
Grant Recommendations to State	12

45th Annual Arizona Drive for People With Intellectual Disabilities

Introduction

History

The drive began in 1974 to raise funds to help children with mental retardation. Today the program serves all people with developmental disabilities.

The first year of the program, the drive brought in almost \$40,000 in revenue. Last year, after 44 years, the drive collected \$140,000 (Net Revenue). The People With Intellectual Disabilities Drive continues to help thousands of people each year.

Originally, the Knights of Columbus teamed up with Tootsie Roll Industries to provide candy as a way to say thanks to those who donated to the program. Today, Tootsie Roll Industries continue to supply the Knights with Tootsie Rolls at wholesale costs so that we can carry on the tradition of saying “Thank you” for each donation. Note that we do not sell the Tootsie Rolls but give them away whether the person donates or not.

Purpose

Funds collected through the PWID program are donated to organizations that directly aid citizens with intellectual disabilities through various programs. Programs may offer verbal, sensory or emotional stimulation. Programs may also provide adaptive training programs that aid persons with intellectual disabilities so that they may better be able to lead healthy, productive lives. The funds we collect may be used to purchase books, computers, recreational equipment, athletic uniforms and special supplies required for vocational or adaptive programs.

The drive’s funds may not be used for salaries, administrative or overhead costs associated with the training or care of People With Intellectual Disabilities.

Eligibility of Charities

All organizations receiving proceeds of the PWID drive must be qualified under IRS rules to receive donations.

The good news is that Councils do not have to submit proof of eligibility for the following:

- Catholic Churches and schools
- Public schools that are part of a government public school district
- Special Olympics
- St. Joseph Youth Camp

People With Intellectual Disabilities
Program Guide - 2019

A list of previously approved charities is available for download from the state website. For **all** other organizations, the Council must obtain and submit a copy of proof of eligibility. Normally this is a copy of a letter issued by the IRS to the organization certifying their eligibility. The organization should be able to provide you with a copy of the letter – just ask them.

Special Olympics Partnership

This year, Special Olympics is once again partnering with the Knights of Columbus. Special Olympics is mentioned on our posters and literature and they have provided a letter of endorsement which we can use to convince businesses to allow us to solicit on their premises.

Posters and Materials

We do have some new posters this year which will be distributed to District Deputies at the June Organizational meeting. Additional, posters can be downloaded from the state website and printed as needed by each Council. Both English and Spanish posters are available. Like last year, the posters do not mention dates. This allows Councils to schedule their drives to suit their own schedules and to reuse the posters in the future.

The submission forms and documentation have all been updated for 2019. All the files for this year's PWID drive can be found on the State website: <http://www.kofc-az.org> Including all the forms, store permission letters, Insurance letters, copies of the posters and more.

Quick Guide for Running a PWID Drive

Here is a check list for preparing and running a successful PWID drive in your Council.

- ✓ Appoint a council PWID Chairman. This Knight must be able to fully understand the program and be responsible for arranging drives at local stores, recruiting the drive team members, resolving problems and reporting results. Computer skills are desirable.
- ✓ Prepare for the drive by scheduling drive dates with stores or planning other fund-raising activities. Order Tootsie Rolls, canisters and aprons in advance. We recommend the Council select the charities to receive the funds raised by the drive and verify their eligibility. If the Council needs to vote on the selection this should be done in advance of the drive.
- ✓ Conduct the drive on the date(s) scheduled. Be sure all funds collected are properly turned over to the Council Financial Secretary who will verify the amounts and turn the funds over to the Council Treasurer for deposit in a bank account.
- ✓ Report the results to the State PWID Director by completing the PWID Expense and Check Request form and mailing it with your Council's check to the State PWID Director.
- ✓ Respond promptly to any requests for clarification or additional information the State PWID Director may have.

People With Intellectual Disabilities
Program Guide - 2019

The remainder of this guide has detailed instructions.

Program Guide

The Grand Knight should appoint a Council PWID Chairman. The Council PWID Chairman must fully understand the PWID drive, its policies and rules. The Grand Knight is responsible for the proper planning, execution and reporting of the drive in his Council.

The Council PWID Chairman should use all available resources to achieve goals. He can contact local businesspeople for individual donations. Many businesses have funds set aside in their budgets for charitable purposes and would be happy to support the cause. The Council can hold a Bingo game, a dance, pancake breakfast or other fund-raising event with proceeds benefiting People With Intellectual Disabilities.

The Council PWID Chairman and Grand Knight are accountable for the Volunteers' behavior. Aggressive behavior will not be tolerated. As passionately as we feel, we, as Catholic Gentlemen, shall conduct the drive with respect and in a passive dignified manner. ([See Code of Conduct](#)) listed below.

Preparation

- ② The State PWID Director will make available for download all the program materials and posters. The Grand Knight should pass along all the necessary posters and material to the Council's Drive Chairman. The material will contain program guidelines, Tootsie Roll order forms, apron order forms, and letters of permission from various grocery and retail stores.
- ② Council PWID Chairman should begin putting the campaign together. First, complete the Tootsie Roll order form. Remember that in order to avoid paying a 5% freight cost; Councils must order 33 cases or more. Therefore, it is recommended that Councils band together to order their Tootsie Rolls. Tootsie Roll Industries will invoice the ordering Council at the time the Tootsie Rolls are shipped. The District Deputy can assist with Councils in his District locating other Councils to combine orders.
- Chairman or Grand Knight needs to reserve storefront in advance with PWID Director. This will help de-conflict multiple Councils trying to use the same store. The PWID Director will attempt to accommodate Councils request as best as he can.
- ② Complete the apron order form if needed. Call to arrange store coverage. Council PWID Chairman will ensure that each volunteer scheduled shows up for his or her appointed shift and or find replacements to cover any absences. They should also visit each location to provide volunteers with refreshments and breaks and collect all funds. Volunteers should not be left holding large amounts of cash. (Remember, the cost of refreshments for volunteers is not an allowable expense to be deducted from revenue).

People With Intellectual Disabilities
Program Guide - 2019

Preparation (Cont.)

- ☐ A few weeks before the weekend of the drive, the Council PWID Chairman should begin visiting the local stores (within parish/ Council boundaries). He should take a copy of the appropriate permission letter and meet the Store Manager, explain the purpose of the drive, show him or her the permission letter (if applicable), and advise the manager of the dates for the drive. If possible, have the manager indicate his or her approval on the Council's copy of the permission letter (often different managers may be on duty during the dates of the drive).

- ☐ As soon as the Council receives its invoice from Tootsie Roll Industries for its purchases, it should be paid promptly in accordance with Council financial procedures. If the Council purchased Tootsie Rolls from another Council, it should promptly make payment to that Council.

- One recommendation received from a Council suggests contacting the local Chamber of Commerce for a list of businesses in your area. The Council can then contact the businesses to see if they would like to sponsor the drive with donations to cover the cost of the Tootsie Rolls. The Council can then advertise their sponsor's involvement and reduce the cost of the Tootsie Rolls, thus allowing more of the proceeds going to their charities.

Conducting the Drive

- The day of the drive, the first volunteer should introduce him or herself to the manager on duty and gain their approval. If possible, provide the first person for each location with a copy of the permission letter. If a problem arises, the volunteer should contact the Council PWID Chairman, who can respond to clear up the problem. The volunteers should be instructed to not solicit donations if the on-duty Manager does not grant permission, but rather wait for the Captain or Chairman to respond and clear up the situation. One to two weeks prior to the drive, the Council should receive their Tootsie Rolls, canisters, hats, and aprons (if ordered). At this time, the Council PWID Chairman should distribute posters, permission letters, canisters, aprons, and candy to each of the Captains. The Captains will then ensure that the first volunteers scheduled for each location will have a starter supply of candy, aprons, and canisters before the day of the drive.

- ☐ The Council PWID Chairman or a Captain should visit each location regularly throughout the drive. Each volunteer should be given an opportunity to take a break and be provided water or a soft drink. Donations should be collected during each visit. Donations collected should be counted and rolled as they are brought in from the locations. It is recommended that a team of money counters headed by the Council's Financial Secretary be used to keep a running tally of the drive's revenue. Team members can include Council Trustees, Treasurer, or other financially savvy Council members.

People With Intellectual Disabilities
Program Guide - 2019

Conducting the Drive (Cont.)

- The Council PWID Chairman ensures that volunteers are not left holding large sums of money at any time during their shift. All funds should be collected before a volunteer leaves his location at the end of each shift. All funds collected must be counted, rolled and turned over to the Council's Financial Secretary daily so that it can be re-counted and turned over to the Council Treasurer for deposit.

PWID Reporting

At the conclusion of the drive, the Council Financial Secretary and PWID Chairman complete a PWID Expense and Check Request Report. The report must indicate: the Council's gross receipts, the Council expenses, 25% of the Council's net receipts that are to be forwarded to the State Council and a list of the organizations to which the Council will be donating its remaining proceeds. If the Council requires a vote on the distribution of funds, the Council Drive Chairman must bring this up at the first Council meeting after the conclusion of the drive if not already done. He must then make sure that the People With Intellectual Disabilities Program Drive Report is completed, that a check is written for the ***total net proceeds***, and that both are given to the Grand Knight to be sent to the State Intellectual Disabilities Director by **November 29, 2019**. This also includes your Council's recommendations to the State Intellectual Disabilities Director about organizations that would benefit from a donation from the State Council.

Remember the total Council's net proceeds, including the State Council's 25% shall be sent to the State People With Intellectual Disabilities Director. His name and address are on the form.

In addition, Councils who order Tootsie Rolls for multiple Councils shall not include the total expense of all the rolls in their expense form. Only the portion the Council spent on the Tootsie Rolls for their own Council should be reported. Each Council should report the portion they purchased for their own Council on their respective expense report.

Expense & Check Request Form Preparation

- At the conclusion of the drive, all revenues must be accurately accounted for. As with any Council program, all funds must be turned over to the Council's Financial Secretary. He will then verify and account for the funds and issue appropriate receipts. After recording the funds, the Financial Secretary will turn over the receipts to the Council Treasurer. The Treasurer will verify the funds to be deposited, issue the Financial Secretary a receipt and deposit the funds into the Council's general bank account.
- As soon as possible, the Council Financial Secretary should provide the Council PWID Chairman with an accounting of all revenues and a detail listing of all expenses.

People With Intellectual Disabilities

Program Guide - 2019

Expense & Check Request Form Preparation (Cont.)

- The only authorized expenses include candy (Tootsie Rolls purchased for their Council only), aprons, shipping, and canisters. Unauthorized expenses include parties or refreshments for volunteers, gas or mileage for volunteers, parties for children, material for construction of signs, printing, postage or administrative supplies. After listing income and expenses, the PWID Chairman should then subtract expenses from income to determine the Council's net proceeds.
- The Council PWID Drive Chairman will then forward the report to his Grand Knight who will review and approve the report. The report will be made to the Council in accordance with local customs and by-laws, and the distribution of funds should be decided by a vote of the Council. The Council must allow only properly documented nonprofit organizations to be accepted for distribution of funds.
- The Council Grand Knight will then request a check for the **TOTAL** net proceeds from his Financial Secretary.
- The Council Financial Secretary shall follow established protocol and forward the request to the Council's Treasurer so that a check is prepared.
- Once the check has been prepared, appropriately reviewed by the Council's Grand Knight and signed, it should be placed in an envelope, along with the expense report and mailed to the State Programs for People With Intellectual Disabilities Director. The Council should keep a copy of the report for its files.
- The Expense & Check Request form need not be signed, but legibly record the names of the Grand Knight and Financial Secretary.

Submission of Funds

All funds shall be turned in to the State PWID Director by **November 29, 2019**. Send the PWID Expense report and check to:

Joe Curran
AZ State PWID Director
4408 W. Olivette Mine Pl.
Tucson, AZ 85745-4122

Please make all checks payable to "AZ KofC Charity, Inc."

The PWID report may also be submitted electronically (preferred) to the following email address:

Joe Curran
JC22925@gmail.com

Dispersion of Funds

Upon receiving the checks from the State Treasurer, the Grand Knight will arrange to present the checks to the organizations. This can be done at an open house, awards banquet or other public gathering. This is an ideal time to publicize the event by issuing a media release, inviting members of the media to the presentation and/or having a photographer present to record the event. Remember to always let the receiving organization know ahead of time if you plan to invite the media so that they can be prepared.

In the event a Council selects either Special Olympics Arizona (or local divisions) or St. Joseph's Youth Camp, all funds from the state will be sent directly to the respective charity in the name of the Council donating the funds. There is **No Method** to send the checks directly to the Council. Copies of the checks will be sent to the Financial Secretary of the Council for their records.

District Deputies' Responsibilities

District Deputies (DDs) will assist Councils in obtaining materials from the state website if required. All forms can be downloaded from the state website: [http:// www.kofc-az.org](http://www.kofc-az.org). The State Deputy and Officers will hold the District Deputy accountable for Council participation and the success of the PWID effort. The District Deputies will be responsible for reports that will be sent to State Deputy, State Officers and PWID Director. If, for any reason, a Council is not participating in the PWID effort, the District Deputy will communicate the reason within the DD PWID Report. The District Deputies will ensure that all PWID funds are turned in by **November 29, 2019**.

Processing of Expense & Check Request Forms

When the State PWID Director receives the Expense and Check Request form, he verifies:

1. The form is correct and complete
2. A check is enclosed for the correct amount and payable to the AZ K of C Charity Inc.
3. Any necessary proofs of eligibility to receive tax-deductible donations are enclosed

If all is on order, the State PWID Director approves the form and sends a copy of the form and the check to the State Secretary.

If the form is incorrect or missing information, the Council will be notified to provide the needed information. The check will be sent to the State Treasurer who will hold the funds pending submission of a corrected form.

An incorrectly completed check will be returned to the Council for correction (remember, the check must be for the net amount and payable to the **AZ KofC Charity, Inc.**).

The State Secretary deposits the Council's check and reviews the submitted form. If he approves, he requests the State Treasurer to issue checks payable to the charities.

The State Treasurer receives vouchers from the State Secretary and issues checks which are mailed to the Council for presentation.

People With Intellectual Disabilities
Program Guide - 2019

Code of Conduct

The Council PWID Chairman and Grand Knight are responsible for the volunteers' behavior. Aggressive behavior will not be tolerated. As passionately as we feel, we are gentleman and we shall conduct the drive with respect and in a dignified manner.

PWID Drive Volunteer -

Volunteers should be friendly and cheerful to all (even those who do not donate). Volunteers should solicit donations in a passive manner, wishing each passerby a "Good Morning," "Afternoon," or "Evening" and offer each person they encounter a Tootsie Roll.

They should not badger or disturb the customers of any establishment. They should respect the rights of parents to refuse candy offered to their children. Parents today often train their children not to accept candy from strangers. Ask the parent for permission to offer their child a Tootsie Roll. Offer the candy to the parent to give to the child later. You will win friends and gain donations by respecting the parent. We do not sell the Tootsie Rolls but buy them to give away as a thank you for their donation.

People With Intellectual Disabilities
Program Guide - 2019

Grant Recommendations to State

At the conclusion of the drive, the Grand Knight of each Council can make recommendations about how the State Council's portion of the drive's proceeds are to be distributed. If the Grand Knight of a Council knows of an Intellectual Disabilities organization that would benefit from the pooled resources of the State Council, he can make a recommendation to the State Council on the organization's behalf.

The Grand Knight should provide the organization with a copy of the State Grant Distribution Request form. The organization completes the form and provides all the requested supporting documentation. The organization then submits their application to the Grand Knight. The Grand Knight then attaches a letter of recommendation to the organization's application and forwards it to the State Programs for People With Intellectual Disabilities Director.

The State Programs for People With Intellectual Disabilities Director reviews all applications received prior to the deadline of **December 31, 2019**. The director forwards his recommendation to the State Council. The State Council then decides on the distribution of its portion of the proceeds. Disbursements will be made on or about February 1, 2020 directly to the charity requesting the grant.

The State Programs for People With Intellectual Disabilities Director will also recommend to the State Council Officers donations to be made to Intellectual Disabilities Organizations located in communities where there are no active Knights of Columbus Councils.

It is not necessary for the Council's selected charities to fill out the Grant Request forms for the amount that the Council has elected to give to them. The grants are additional funds requested by the charity for projects that meet the criteria listed on the grant request.