Section 1) Area Chair Responsibilities & Appointments – An Overview of the Role of the Area Chair
Area Communications and Membership Roles

Section 2) Hospitaller Programs – A Description of Various Types of Association Activities
Role of the Hospitaller

Section 3) Setting up a Day of Recollection – Some Steps in the Process of Putting a Day Together

Section 4) Other Area Meetings

New Members

Section 5) Criteria for Identifying Potential Candidates for Membership

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SECTION 17)  
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SECTION 18)  
GENERAL INFORMATION  
   POLICY FOR SUBMITTING GRANTS BY THE AREA CHAIR  
   REGULATIONS FOR APPLICATION SUBMITTAL  
   GUIDELINES  
   GRANT APPLICATION  
   GRANT FOLLOW UP INFORMATION FORM
Section 1  Area Chair Appointments & Responsibilities  
Revised January 2009

Overview
Areas are composed of all members of the Association who reside in a defined geographic area. The Area functions in conformity with the By-Laws of the Association. The Area is directed by an Area Chair who is initially appointed by the President with the approval of the Board of Councillors of the Association. The Area Chair is assisted by an Area Hospitaller, an Area Treasurer, other designated members, and an Area Chaplain, who has under his care the spiritual life of the members of the Area.

Appointments (Taken from SMOM-AA By-Laws Article III, Section 10)

Area Chairpersons will be appointed by the President, subject to approval by the Board of Councillors.

Prior to expiration of an Area Chairperson’s term, or when a vacancy otherwise occurs, the President will invite area members to suggest, in writing, not more than three (3) persons for the President’s consideration for appointment to serve as Area Chairperson. After consideration of the persons suggested and such other area members deemed suitable and qualified for service as Area Chairperson, the President will appoint a Chairperson for a three (3) year term, subject to approval by the Board of Councillors. The appointed Chairperson is eligible to be considered for reappointment for not more than one (1) additional three (3) year term.

Responsibilities:

1. The Area Chair is responsible for maintaining on-going communications between the President, the Chancellor, the Hospitaller, the Association office and other delegates and such other officers, persons, committees as the Board of Councillors shall direct. He/She will support the mission, objectives and activities of the Association, providing leadership in support of the recommendations and requests of the Association President and the Board of Councillors.

2. He/She will have responsibility to further the charitable, religious and beneficent works of the Association.

3. He/She will arrange for projects, works, and ministries in which members will work “hands-on”. He/She will also arrange for spiritual events as directed by the President and Board of Councillors of the Association (e.g. Mass for the Feast of Saint John the Baptist on June 25, Mass for Life on September 8 and World Day of the Sick on February 11).

4. The Area Chair will provide oversight on all Area and Association activities within his/her area and will report any issues, concerns or irregularities to the Association President or the Executive Director on a timely basis.

5. He/She will work with the Area Chaplain to schedule days of recollection, retreats, and educational seminars in the faith for Area members and to establish a plan of spirituality based upon the charism of the Order to seek the glory of God through personal sanctification, defense of the faith and service to the sick and poor.

6. He/She will be responsible for adopting a five-year membership plan to be updated annually for the purpose of increasing membership in the Association and the Order. Proactive initiatives should be planned to identify high quality candidates for membership.

7. He/She will establish a program of preparation for all candidates seeking membership in the Association.
8. He/She will process all applications for membership in accordance with the procedures established by the Admissions Committee and approved by the Board of Councillors of the Association.

9. He/She will establish a plan of communications that may include a newsletter, a website, e-mails, phone calls, and other means to enhance the Area’s effectiveness.

10. He/She will provide annually the calendar of activities, spiritual and social, for all members and for candidates for membership. He/she will provide a preliminary copy along with member involvement and other pertinent information to the national office prior to release to the Area to review for conflicts with other activities of the Association; this preliminary calendar should be submitted by December 31 each year.

11. He/She will encourage the development of the Malta Auxiliary within the Area.

12. He/She will encourage members and new candidates to participate in the annual Lourdes Pilgrimage. (It is strongly recommended that members participate in the Lourdes pilgrimage at a minimum, at least once, in the first five years of membership.)

13. He/She will encourage members to support the growth of the Malta Human Services Foundation.

14. He/She will encourage membership participation in the bi-annual membership conferences sponsored by the Association.

15. He/She will participate or appoint a designee to participate in the Annual Business meeting, the Annual Investiture Liturgy, and in the meetings called by the President of the Association.

16. He/She will provide to the Association’s Executive Director quarterly financial statements detailing the financial activities of the delegation in a form determined by the Executive Director and the Treasurer of the Association.
Area Communications Chair (November 2010)
This is a generic description, of which some aspects may not apply to every Area,
The Communications Chair reports to the Area Chair and has responsibility to ensure that effective plans are
developed to ensure that the Area members receive timely and meaningful communications on Area,
Association, and Order activities, messages and events that affect members or call them to action.
Some specific responsibilities of the Communications Chair:
1) Assists the Area Chair by coordinating the development and distributing the Area calendar.
2) Prepares communications for the Area Leadership to distribute based on specific actions and activities which
the Area Leadership authorizes. This includes but is not limited to invitations to area events and activities;
reminders of Association events and activities; communication on major activities such as the Lourdes
Pilgrimage, the Investiture, the Association election, major fund-raising activities such as the Foundation’s
Capital Campaign, Area fundraisers and social events.
3) Works with appropriate leaders or committees to develop materials and schedules for Year of Preparation
activities.
4) Works with the Area Chair to develop communications to the Area Membership as necessary.
5) Manages the development of the content for the Area section of the Association web site. Inputs the content
or works with the designated person to keep the web site updated and current. Develops plans to encourage
members to use the web site.
6) Works with Area Leadership to encourage Area Members to provide e-mail addresses to the Association to
facilitate quick and low cost communication
7) Maintains Area roster and communicates changes to the NY office when appropriate regarding changes in
membership status.
8) Develops communications materials about Area works and Ministries and other news and events for
members, for the press as appropriate, and for the Association’s leadership.

Area Membership Chair (November 2010)
This is a generic description, of which some aspects may not apply to every Area,
The Membership Chair reports to the Area Chair and has responsibility to ensure that effective plans are
developed to identify potential candidates and that activities are scheduled to provide potential candidates with
the information and exposure they might need to pursue membership. The Membership Chair works with
sponsors and with the NY office to ensure the timely and complete submission of materials for each candidate’s
application for membership. The Membership Chair assists the Area Chair in developing short and long-term
targets for new membership within the area.
The Membership Chair will work with the Auxiliary Chair to identify candidates for the Auxiliary Corps and to
identify Auxiliary members who might be potential candidates to become Knights or Dames.
Some specific responsibilities of the Membership Chair:
1) Assists the Area Chair by managing a team of Area Members whose responsibility it is to identify potential
candidates for membership.
2) Develops and/or participates in the planning and execution of receptions, meetings, luncheons or other
individual or group activities to which potential candidates are invited.
3) Works with the Communications Chair and the New York office to develop and to assemble materials which
can be shared with potential candidates.
4) Works with Area sponsors and candidates in Year of Preparation to assist where possible and to coordinate
the submission of documents and forms that are part of the admissions package. Ensures that timely submission
occurs and follow-up as needed is taken.
5) Works directly with area members, chaplains, and parish clergy to identify projects
Section 2  

**Area Hospitaller Responsibilities**  

February 2008

Overview

The Area Chair appoints the Area Hospitaller or Hospitallers subject to the ratification of the Board of Councillors. The Hospitaller(s) assist(s) the Area Chair in fulfilling the mission of the Association of service to the sick and poor and in witnessing the Roman Catholic Faith through the development and implementation of the Order’s “Hospitaller Activities”: Blessed Gerard Projects, Malta Ministries, Malta Works and Spiritual Works.

Hospitaller Responsibilities:

1. The Hospitaller shall assist the Area Chair by identifying new Malta Ministries and Works that may be adopted within the Area and assisting in the planning and implementation of these programs.

2. The Hospitaller shall work to strengthen existing Ministries and Works and to engage the membership in active participation and hands-on work, including current members and candidates in preparation.

3. The Hospitaller shall apprise the Area Chair on the progress of the development of Ministries and Works and shall keep the Area Chair and the Hospitaller of the Association informed as to the status of the Ministries and Works within the Area.

4. The Hospitaller shall assist the Area Chair in encouraging members and candidates in preparation to participate in the annual Lourdes Pilgrimage (a work of the Association), to participate in the biannual National Conference sponsored by the Association, and to generally support the Works of the Order as a whole, including Prison Ministry and outreach to the Order’s international works.

5. The Hospitaller shall be actively involved with the Area Chair and the membership committee in sharing information about the Ministries and Works of the Order with prospective members.

6. The Hospitaller shall participate in the Annual Business Meeting, the Annual Investiture Liturgy, and the meetings called by the President of the Association, including national workshops or conferences for Hospitallers and Area Chairs.

7. The Hospitaller shall assist the Hospitaller of the Association in arranging for visitations to the Area for the purpose of supporting the Ministries and Works of the Area.

8. The Hospitaller shall assist the Area Chair and Chaplain in developing, implementing and promoting programs and liturgies to enhance the spirituality of the members and candidates in preparation.

9. The Hospitaller shall be mindful that each Area will have its own particular expression of how best to serve the sick and poor and to witness the Faith through hands-on activities. At the same time, hospitaller activities within each Area should be carried out and described in accordance with the following guidelines of the Association:
HOSPITALLER ACTIVITIES

BLESSING GERARD PROJECTS
A Blessed Gerard project is an activity in which an Association member participates in support of his/her personal commitment to defend the faith and to assist the sick and the poor. Other Association members may also participate, but it is not primarily a work of the Association; rather, it is an activity sponsored by some other organization in which the Association member participates. Generally, members participate in Blessed Gerard Projects because they are geographically removed from other established Malta projects or the member wants to develop a new project needed in the area or the member wants to establish or participate in a project suited to his/her talents or skills according to the circumstances of his/her life.

MALTA MINISTRIES
A Malta ministry is program or activity in which a number of Association members are actively engaged, some of whom are in leadership positions (such as officers or board members). The activity has been designated by the Area Chair or the Area Hospitaller for Malta service by area members. The financial or administrative support required from the Area may vary depending on the activity. The sources of funding can vary, including but not limited to donations, area treasury, admission fees, cost underwriting by a member or friend of the Area. While the organization is not operated or owned by the Order of Malta, its purpose and activities are in direct alignment with the charism of the order to defend the faith and/or to serve the sick and the poor.

MALTA WORKS
A Malta work is a program or project designated by the Association or the Order of Malta as an ‘official’ activity of the Association/Order. Its leadership includes a number of Malta members (officers/board members); its on-going activities are supported both financially and by volunteer labor from the Association. The Order or the Association has made a long-term financial commitment to the organization/activity. These works are typically supported within and beyond an Area by the Association.

SPIRITUAL WORKS
Spiritual works include Masses for specific feast days (Saint John the Baptist, Our Lady of Lourdes/World Day of the Sick,), Days of Recollection, Retreats, Forums, the Association’s Biennial Convention, and the Solemn Liturgy of Investiture.

Section 3  Setting up a Day of Recollection for an Area

- It is recommended that an Area have at least two days of recollection scheduled each year, one in Advent and one in Lent. It is important that your area members are well informed regarding the schedule for the days of recollection. To increase participation over time, it is helpful to schedule the days at the same time (e.g., on the first Saturdays of Advent and Lent).

- The Area Chaplain should participate in planning the day.

- Involve your Ordinary in days of recollection whenever possible.

- Written invitations with reply cards/envelopes should be sent up to six weeks in advance in order for people to block their calendars (Exhibit B).

- Follow up with e-mails one to two weeks prior to the event as reminders.

- Personal calls by area board members within one to two weeks of the event will increase attendance.

- The day of recollection should be followed by Mass.

- A number of Areas run a very successful luncheon following the Mass.

- The dates for the days of recollection should be included in the annual calendar provided to area members.

Summary of the procedures for setting up the day of recollection:
1) engage the chaplain to help plan the day.
2) schedule the Church and the Mass.
3) involve the local Ordinary.
4) send letters of invitation six weeks in advance with reply cards.
5) follow up with e-mails one to two weeks prior to day.
6) have area board members make personal calls one week prior to day.
7) plan luncheon following program.
Section 4   Other Area Meetings

Each area is encouraged to sponsor a number of other meetings during the year. For help in thinking through or setting up different kinds of meetings and events, you can contact other areas or the New York office for references.

Some examples of other meetings are:

- Area annual dinner and meeting
- Forums
- Education sessions
- Retreats
- Planning meetings for Malta works/activities
Section 5  Criteria for Identifying Potential candidates

The following is criteria for identifying potential candidates for membership

1) Exemplary, strong, practicing Catholic in good standing, residing in the United States;

2) A person who has achieved or is achieving distinction in his/her chosen field;

3) Someone who faithfully provides outstanding service to church and community and is willing and able to commit to the Order as expressed in the motto by defending the faith and assisting the sick and the poor:

“Obsequium pauperum et tuition fidei” - Service to the poor and Defense of the faith

In working to build new membership, it is important to focus on identifying top quality candidates who meet the above criteria. Ideal candidates are Catholics in good standing who have the time and the interest to participate in activities focused on the defense of the faith and service to the sick and the poor.
Section 6 Preparing a Reception for New and Potential Members
(revised August 2009)

Some tips for hosting a reception for potential members:
• Host a reception cocktail party at a country club; if appropriate, the home of a Knight or Dame could be considered.
• Invite the Ordinary of the diocese to attend and ask him for a list of potential members. Get permission to use his name in the invitation letter.
• Keep the Area Chaplain involved in the planning and in the reception itself.
• Ask area members to identify one or two candidates who should be invited to the session; the member should plan to attend with the candidate.
• Send formal invitations. (Exhibit C)
• Follow ups: e-mails, calls, letters, etc.

Program Agenda:
• Short introductory period/name tags/informal introductions
• Reception
• Introduction by Area Chair
• History of the Order by Knight or Dame or invited guest
• Review of Lourdes Pilgrimage by Area Chair or Lourdes Pilgrim
• Review of Area works/ministries by Area Hospitaller or active members
• Remarks by Ordinary/Chaplain
• Brief outline of admissions process by Area Chair
• Q/A session
• Reception continues

Some suggestions:
• Have a DVD monitor set up on a table showing the Lourdes Pilgrimage.
• Have a computer with internet access set up with the Association web site displayed.
• Have Association and Area materials available (newsletter, pamphlets, calendar, etc.)

Resources from the American Association that you can call on (will travel):
- Jack Pohrer - Association Chancellor and Acting President
- Peter Krause - Grants committee chair
- Bob Fredericks - Admissions committee chair
- Ken Craig - Membership committee chair
- Joe Metz - Association Hospitaller
- Mary McCooey - Association Vice Hospitaller
- Msgr. Cassidy – Assistant Principal Chaplain
- Msgr. Wallin – Spiritual Advisor to the Board of Councilors
Section 7&8 Membership Application Process – Overview & Guidance and Application

SOVEREIGN MILITARY HOSPITALLER ORDER OF SAINT JOHN OF JERUSALEM, OF RHODES AND OF MALTA
AMERICAN ASSOCIATION, U.S.A.

Application for Membership
Introduction and Instructions

1. Each candidate for membership must be sponsored by a member in good standing who is not related to the candidate. The Area Chair cannot be the sponsor. Clergy can recommend but cannot be the sponsor for a candidate.

2. The Area Chair for the area in which the candidate resides must endorse the application by signing in the appropriate location prior to submitting pages 1 and 2. Completed pages 1 and 2 are due in the Office of the American Association in New York by June 1 of the year prior to the year of expected approval and Investiture.

3. If a member desires to propose a candidate for membership that does not reside within an established area of the American Association, pages 1 and 2 of the application form should be forwarded to the Executive Director at the New York Office of the American Association.

4. At the time of acceptance of the application, the Area Chair will supply in writing to the candidate and sponsor a detailed list of all spiritual activities for the coming year, the dates of the Annual Pilgrimage to Lourdes and a detailed list of all area projects and activities. Dates and locations for Retreats and any National Meetings will also be provided. The Area Chair should encourage the proposed candidate to take the necessary steps to become a Eucharistic Minister. Additionally, the Area Chair will provide the candidate with a copy of The Prayer of the Order and recommend that it be said daily throughout the Preparation Year.

5. It will be the responsibility of the sponsor to insure that the candidate becomes acquainted with the history of the Order during the year of preparation and participates in its works and programs. The sponsor will be required to certify to the completeness of the preparation effort together with the Area Chair by April 1 of the year of Approval and Investiture.

6. Either accompanying the submission of the application, or within thirty days thereafter, the candidate must request that a pastor's letter be sent to the Assistant Principal Chaplain at the Office of the American Association attesting to the fact that he/she is a practicing Catholic within the parish community. The purpose of this letter is to assist the Assistant Principal Chaplain of the American Association in the obtaining of a letter of recommendation from the bishop of the candidate's diocese regarding the candidate's life and conduct.

7. No later than August 1, the candidate must submit to the Office of the American Association a Certificate of Roman Catholic Baptism or a Certificate of Acceptance into the Catholic Church and a Certificate of valid Roman Catholic Marriage or a Certificate of Marriage recognized by the Catholic Church, if applicable. These certificates should have a raised seal of the church issuing them. If you are unable to provide an original copy with the raised seal, a copy of the certificate (must be notarized) would be accepted. If divorced, the candidate must submit a Statement of Marital Status.
8. The Office of the American Association will submit invoices for fees and required contributions during the Year of Preparation. Those fees are currently as follows:

All Candidates: $200(men), $160(women) Decoration fee. In addition, all candidates must purchase a Robe/Cape for use in liturgical functions. Details will be provided at the appropriate time. (Approximately $585)

Age 40 and older: Euros 2,000 *Initial Contribution to be paid by April 30.  
$1,500  Annual Contribution payable year AFTER November Investiture.

Age 35-39:  Euros 1,000 *One Half Initial Contribution to be paid by April 30.  
$1,000  *One Half Initial Contribution paid over first five years, minimum annual payment is $200  
$700  Annual Contribution begins March 31 of the second year after Investiture.

Age 30-34: Euros 1,000  *One Half Initial Contribution to be paid by April 30.  
$700  Annual Contribution begins March 31 of the second year after Investiture.

*The initial contribution is sent to the Grand Magistry in Rome

GENERAL

Application forms are available from the Area Chair or from the "Members Only" section of the Association website, www.maltausa.org.

If all of the documents are submitted timely and all required contributions and fees paid, the Admissions/Preparation Committee of the American Association will review and approve each application for completeness, and submit a recommendation to the Board of Councillors for approval in May of each year. If approved by the Board of Councillors of the American Association, the completed applications will be forwarded to the Grand Magistry in Rome with approval and consent of the President of the American Association. The New York office of the American Association will be advised of the action taken by the Grand Magistry and the candidate will be so advised.

If any circumstances occur that are not clearly outlined by these instructions, the sponsor or the Area Chair should communicate with the Executive Director of the American Association.

SUMMARY OF SUBMISSION DATES

June 1: Submission of pages 1 and 2 of the application with Baptismal Certificate and Marriage Certificate (if applicable).

July 1: Pastor’s Letter of Recommendation due.

August 1: Submission of Baptismal Certificate and Marriage Certificate or Statement of Marital Status, if divorced, if not submitted with pages 1 and 2.

April 1 Year of Investiture: Submission of signed Pledge to Grand Master and page 3.
APPLICANT

FIRST NAME

MIDDLE NAME

LAST NAME

FAMILIAR FIRST NAME

BIRTHDATE

US CITIZEN (Y OR N)

IF NO, WHAT COUNTRY

MARRIED, WIDOWED, SINGLE, DIVORCED

NAME OF SPOUSE

HOME ADDRESS

STREET

CITY

STATE

ZIP

PHONE

FAX

CELL PHONE

E-MAIL

OCCUPATION

POSITION

COMPANY

STREET ADDRESS

CITY

STATE

ZIP

PHONE

FAX

CELL PHONE

E-MAIL

EDUCATION


SPONSOR

FIRST NAME

LAST NAME

SIGNATURE

AREA CHAIR

NAME

MALTA AREA

PHONE

SIGNATURE

BISHOP / ARCHBISHOP NAME

DIOCESE

MAILING ADDRESS

STREET

CITY

STATE

ZIP

Parish

Pastor

Mailing Address

street

City

State

Zip
AREA CHAIR: To start the Year of Preparation, submit the original copy of pages 1 & 2 of the application no later than June 1 in the year prior to the year of investiture. Send an original copy of a Baptismal Certificate with embossed seal and an original copy of a Catholic Marriage Certificate with embossed seal as soon as they are available but no later than August 1. Send to The Executive Director, Order of Malta, Suite 1350, 1011 First Avenue, New York, NY 10022

Name of Candidate ___________________________ Start Date ___________________ Area ___________________________

Sponsor's Recommendation Form

SPONSOR

Considering the following questions:
   How long have you known the applicant? Do you know the candidate’s family? Would you describe the applicant as an exemplary Catholic who supports the teachings of the Church including all pro-life issues? Describe any distinction this person has achieved. Does the applicant understand the commitment one makes when entering the Order of Malta? In your opinion, will the applicant be willing and able to participate in the hospitaller works and spiritual programs of the Order? Any additional thoughts about the applicant?

Please state the reasons why you wish to sponsor this applicant: __________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

I understand that I will be the liaison between the applicant and the Area Chair. If this candidate is accepted into the Preparation Program, I realize that I am responsible for accompanying the applicant to Area and Association events throughout the period of preparation.

Signature of Sponsor ___________________________ Date _______________

RESUME

Please do not exceed the available space on this page.

Please include the spiritual and corporal works performed on behalf of the Church, the sick and the poor.

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

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AREA CHAIR'S APPROVAL ___________________________ Date __________________

Area Chair: Submit the original copy of this page2 with page 1 of the application no later than June 1 in the year prior to the year of Investiture.
SERVICE IN THE PREPARATION YEAR

The Preparation Program requires service, including “hands-on service to the sick and the poor”. The candidate is asked to describe the spiritual and corporal works, performed on behalf of the Church, the sick and the poor, undertaken during the Preparation Year. Emphasize Malta Works, Malta Ministries and Brother Gerard Projects. Please do not exceed the available space on this page.

The Candidate has successfully completed the Preparation Program:

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AREA CHAIR: Submit the original copy of this page 3 of the application no later than April 1 in the year of Investiture.
SOVEREIGN MILITARY HOSPITALLER ORDER OF ST JOHN OF JERUSALEM
OF RHODES AND OF MALTA
AMERICAN ASSOCIATION, U.S.A.

Pastor's Recommendation

Considering the mission statement and the following questions:
   How long have you known the applicant? Would you describe the applicant as an exemplary Catholic? Is the applicant a participating member of the parish? In your view, would the applicant be an appropriate member of the Order of Malta as stated in the mission above?

Please state the reasons you would recommend the applicant:

______________________________
Applicant's Name

______________________________     _______________________________
Name of Parish       City, State

______________________________
Printed name of Pastor     Signature of Pastor

Please mail this form to:
Rev Msgr James Cassidy, Ph.D., ChC   1011 First Avenue, Suite 1350   New York, NY 10022   212 371-1522 (phone)   212 486-9427 (fax)
PLEDGE TO GRAND MASTER

His Most Eminent Highness, Fra’ Matthew Festing,  
Prince and Grand Master

Eminent Highness,

I, the undersigned, declare that I profess the Roman Catholic Apostolic Faith and that I am thoroughly acquainted with the Constitutional Charter, the Code and the regulations of the Sovereign Military Hospitalier Order of St John of Jerusalem of Rhodes and of Malta currently in force. Under all circumstances, I agree to conduct my life in conformity with these Laws and especially the provisions that relate to the members of the Third Class of the Order. I will engage in charitable activities directed on behalf of the Order and the American Association.

I understand the requirements for membership in the Order of Malta and will fulfill these obligations by participating in the life and work of the Order. I commit to the spirituality of the Order of Malta; to personally serve the sick and the poor; to embrace the teachings of the Catholic Church including all pro-life issues and to give witness to our Catholic faith.

Respectfully,

(Candidate’s Name)  
(Candidate’s Signature)  
(Date)

Please submit with Page 3 by April 1 of the Year of Investiture
Section 9  New Members – Year of Preparation

Membership in the Order of Malta is a serious step and requires careful consideration and significant work to complete the requirements. It requires a serious intention of lifetime commitment to Malta spirituality, witness of the faith and personal service to the sick and the poor. A commitment to the Lourdes Pilgrimage is also an expected element of membership.

Candidates spend a year in formation, during which they learn about Malta history, spirituality and hospitaller work. They attend Area and Association spiritual and educational events, volunteer in Malta works or ministries and are invited to participate in the Lourdes Pilgrimage and Association retreats.

The sponsor and the area chair work together to ensure that the candidate has a sufficiently meaningful, rich and varied set of activities for the Year of Preparation. A one day seminar sponsored by the Area provides a quality-controlled way to ensure that the candidates receive an in-depth view of the Order, the Association and the meaning of membership.

At the end of the year, the candidates may express their commitment and complete their application. The sponsor and the area chair both must affirm that the candidate has successfully completed a meaningful and complete year of preparation.

A high-level summary of the Year of Preparation activities would probably include all or most of the following activities:

a) Attending area-sponsored activities including Masses, Days of Recollection, sponsored works
b) Hands-on work to be determined by the candidate in conjunction with the sponsor and the area chair
c) Attending the Lourdes pilgrimage
d) Participating in Membership conferences and retreats.

Sample Agenda for a one day Preparation Program Seminar
Schedule the seminar no later than late summer/early fall if possible.

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<tr>
<th>Agenda</th>
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<td>Possible topic</td>
<td>Area Chair</td>
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<td>Introduction</td>
<td>Area Chaplain</td>
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<td>Prayer</td>
<td>Knowledgeable member</td>
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<td>History of the Order</td>
<td>Area Chaplain</td>
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<td>Spirituality of the Order</td>
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<td>Preparation and Application Process</td>
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<td>Hospitaller Tradition</td>
<td>Area Hospitaller</td>
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<td>Malta Works (samples)</td>
<td>Active participants</td>
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<td>Holy Family Hospital of Bethlehem</td>
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<td>Area Blessed Gerard Projects and Malta Ministries</td>
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Section 9  New Members – Year of Preparation (continued)

- Ministry to the Sick and Aged
- Tutoring Program
- Homeless shelter
- Eucharistic ministry

- Defense of the Faith
  - Malta Forum
  - Catechism project

- Other spiritual activities

- Lourdes Pilgrimage
- Mass

**Other Guidance on the Year of Preparation**

1. A Preparation Program should consist of the following:
   - An educational program on the history of the Order or the reading of materials on the history of the Order with follow-up discussions with the candidates by sponsors or the Area Chair or both.
   - A commitment to attend a Malta Pilgrimage to Lourdes within five years.
   - Participation in Days of Recollection, retreats, the Feast of St. John celebration and other spiritual and devotional activities sponsored by the Area. Candidates should be encouraged to say the Prayer of the Order daily and participate in a personal program of prayer and devotion.
   - Devote at least 15 hours of “hands-on” work with the sick or the poor at a project of the Order or another appropriate project approved by the Area Chair or devote at least 45 hours working on defense of the faith projects or make a Malta Pilgrimage to Lourdes during the Preparation year.
   - During the truncated year, the minimum hours cited above will be reduced by half.

   While not required, candidates might be encouraged to become Eucharistic Ministers at hospitals or convalescent homes. Area Chairs might want to establish a formal Eucharistic training program for this purpose.
**Article 109 of the Code of the Order of Malta has the following to say on the Year of Preparation:**

Article 109  
**Preparatory year**  
The reception of Knights, Dames and both male and female Donats must be preceded by a preparatory period of one year during which the candidate becomes acquainted with the history of the Order and participates in its works and programmes. The Sovereign Council has the power to dispense from this requirement in individual cases.

This is from our Association web site under the Membership section:

**What is the year of preparation?**

Candidates spend a year in formation, during which they learn about the history of the Order of Malta, spirituality and hospitaller work. They attend Area and Association spiritual and educational events, volunteer in Order of Malta works or ministries and are invited to participate in the Lourdes Pilgrimage and Association retreats. At the end of the year, the candidates may express their commitment and complete their application.

From the Instructions (page one) of the membership application:

4. At the time of acceptance of the application, the Area Chair will supply in writing to the candidate and sponsor a detailed list of all spiritual activities for the coming year, the dates of the Annual Pilgrimage to Lourdes and a detailed list of all area projects and activities. Dates and locations for retreats and any National Meetings will also be provided. The Area Chair should encourage the proposed candidate to take the necessary steps to become a Eucharistic Minister. Additionally, the Area Chair will provide the candidate with a copy of The Prayer of the Order and recommend that it be said daily throughout the Preparation Year.

5. It will be the responsibility of the sponsor to insure that the candidate becomes acquainted with the history of the Order during the year of preparation and participates in its works and programs. The sponsor will be required to certify to the completeness of the preparation effort together with the Area Chair by April 1 of the year of Approval and Investiture.

And from the Application for Membership, the following is required:

**SERVICE IN THE PREPARATION YEAR**
The Preparation Program requires service, including “hands-on service to the sick and the poor”. The candidate is asked to describe the spiritual and corporal works, performed on behalf of the Church, the sick and the poor, undertaken during the Preparation Year. Emphasize Malta Works, Malta Ministries and Brother Gerard Projects. Please do not exceed the available space on this page.

<table>
<thead>
<tr>
<th>The Candidate has successfully completed the Preparation Program:</th>
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<tr>
<td>Sponsor ___________________________ Date: ________________</td>
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<tr>
<td>Name Signature</td>
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<tr>
<td>Area Chair ___________________________ Date: ________________</td>
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<tr>
<td>Name Signature</td>
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</tbody>
</table>
Section 10  
Who to contact  
(revised 2010)

There are many resources available to the area chair to help him or her become a more effective leader.

The officers and the members of the Board of Councillors are important resources that can provide you with advice and direction when you have a question. Other, more experienced Area chairs can help you walk through the complexities of organizing significant activities. In some areas, there is the opportunity to partner with a neighboring area on important activities, giving you the chance to partner with a potentially more experienced member.

The Association web site, [www.maltausa.org](http://www.maltausa.org), is a rich source of information and forms. It also provides links to other helpful areas on the web.

a) Key Committee Chairs

Here is a list of chair people for key Association Committees. They are always ready to help or to get you to the person who can help you.

**Admissions**: Tom Reedy

**Membership/Area Development**: Ken Craig or Jack Sise

**Auxiliary**: Ken Craig

**Communications**: Tom Carney

**Defense of the Faith/Education**: Hap Redgate

**Finance**: Jim O’Connor

**Grants**: Peter Krause

**Lourdes 2010**: Joe and Gail Berardino

**Malta Human Services Foundation**: Hershel Smith

**Prison Ministry**: Bob Fredericks

**Spirituality**: John Shine

**Sub Priory**: Joseph Metz

**Works/Ministries**: Mary McCooey
b) New York Office

The Association office in New York is source of information as well as referrals to knowledgeable members on many topics. Below is an outline of the key responsibilities of each of the members of the NY office. Please call on them for assistance.

The mailing address for the office is:
Order of Malta, American Association
1011 First Avenue, Suite 1350
New York, NY 10022

The office telephone number is (212) 371-1522. The office fax number is (212) 486-9427.

**Rev. Dr. Jeffrey R. Trexler, Executive Director**
- In charge of the overall daily function of the office, ensuring that tasks are fulfilled in a quality and timely manner.
- Liaison with the diocese, Rome, accounting firms, auditors, financial investors and the board.
- Public relations. Attends memorial Masses and other special Masses and events related to the Association.
- Advisor to officers and committees.
- E-mail: jtrexler@maltausa.org

**Marissa Blackett**
- In charge of the development and fundraising efforts of the Malta Human Services Foundation, the supporting organization responsible for the financial needs of the American Association.
- E-mail: mblackett@maltausa.org

**Raymond J. LaRose, Assistant to the Executive Director**
- Editor of the Hospitaller
- Attends Board and committee meetings; supports the President and the Board
- Provides guidance/direction to office staff in absence of the executive director.
- E-mail: rlarose@maltausa.org

**Maria Di Giacomo, Administrative Assistant for Program Services**
- Office leader for new membership (new members, applications, Auxiliary, robes, decorations, etc.)
- Tracking new member application status and updating data base with new member information.
- Updates database with donations/payments and processes credit card payments.
- Primary telephone receptionist.
- Daily system back-up for disaster recovery.
- E-mail: maria@maltausa.org
b) New York Office (continued)

Miquan A. Festus, Administrative Assistant for Administrative Services
- Office leader for the Grants program.
- Office leader for web site support (including IDs, passwords and updates).
- Office leader for data base support (including queries, reports, labels and records updates).
- Primary responsibility for annual update of membership handbook and maintaining/updating committee listings on all data bases.
- Support for President and Director of Development
- Association Web Site

- E-mail: miquan@maltausa.org

Carla Gunerard, Administrative Assistant for Program Services
- Office leader for the Lourdes Pilgrimage.
- Office leader for the Investiture/annual dinner.
- E-mail: carla@maltausa.org

Matthew LaRose, Administrative Assistant for Accounting
- Administrative Support for Accounting and Bookkeeping
- E-mail: mlarose@maltausa.org

Ann R. Peabody, Program Support
- Lourdes Pilgrimage
- Investiture/annual dinner

Kathleen Glynn Trabucco, Bookkeeper/Assistant for Business Affairs
- Office leader for all financial and accounting activity.
- Prepares audits and monthly reports for treasurer.
- Responsible for most financial transactions (checks, payroll, e-giving, deposits, billings).
- Significant resource regarding office practices, procedures and history.
- Key liaison with various Diocesan departments.
- E-mail: kt@maltausa.org
Section 11  Other Malta-related Web sites

Area Website addresses
Connecticut: www.maltact.org
Florida: www.orderofmaltaflorida.org
Boston: www.maltaboston.org
Malta Prison Volunteers of CT: www.mpvct.org
Malta Prison Volunteers of Indiana: www.mpvin.org

Order of Malta in Rome: www.orderofmalta.org

Other US Associations
Western Association: www.orderofmaltausawestern.org
Federal Association: www.smom.org

Malteser International: www.malteser.de

Malta Auxiliary website address: www.maltausa.org/american_auxiliary.php

The American Association Auxiliary Corps works in association with the Order of Malta whose mission as a lay religious order of the Catholic Church is to care for the sick and poor and bear witness to the Catholic faith.

Malta Human Services Foundation website address: www.maltausa.org/foundation.php

The Malta Human Services Foundation is a 501 (c) (3) supporting organization that has as its sole purpose the support of the Grants Program of the American Association.

Each of these web sites also has links to other web sites. For example, the American Association website has links with the works and activities section to many of the organizations in which our members are involved.
Section 12

Area Finances

- A majority of areas maintain funds received for their area activities (days of recollection, raising of funds for area activities, etc.) in an area bank account.

- When opening an area account, the account should be opened in the following name:

  Order of Malta, American Association (Name of Area) Area

- The bank will ask for a tax identification number. The tax identification number for the Order of Malta, American Association is: 23-7095245.

- As per the regulations of the Order of Malta, American Association, checks up to $4,999.00 can be signed by one authorized signer. All checks $5,000.00 must be signed by two authorized signers. Although their signature may never be needed, the Treasurer and Executive Director must also be included as authorized signers on each area account. In order to get these signatures, please send the papers to Reverend Dr. Jeffrey R. Trexler, Executive Director. He will sign and have the current Treasurer also sign these papers and send them back to the appropriate area representative.

- Financial activities for the areas are reported on a cash basis and run from December to November of each year, in order to facilitate year-end reporting on the financial statements. A copy of the report is attached.

- Copies of all bank statements must be submitted with the reports, along with a reconciliation of the account.

- Areas are also welcome to use accounting packages such as QuickBooks, Quicken, etc.

- Areas reports are due quarterly (except in the case of October and November, where they are due monthly) and are due on the following dates:

  December of each year Due January 15
  1st Quarter (Jan-March) Due April 15
  2nd Quarter (April-June) Due July 15
  3rd Quarter (July-Sept.) Due October 15
  October and November of each year Due December 15
• All areas with Auxiliary Corps. activity should be keeping a financial record of this activity by referencing that it is indeed Auxiliary activity. If the Area Chairman has designated a person from the Auxiliary to handle a separate Auxiliary bank account, the same rules shall apply as to the opening and financial reporting of an area account (copies of the reports should be sent per the schedule above to the attention of the Executive Director, Reverend Dr. Jeffrey R. Trexler and to the area chairman).

• Each July/August, all areas with an area bank account will be sent $20.00 for each member in their area (a list of the members will be sent with the check).

• New Auxiliary applications and fees ($100.00 initiation fee and $50.00 annual fee) will be sent with the application to the attention of the Executive Director. The $50.00 annual fee will then be forwarded onto the appropriate area. Thereafter, annual contribution billing for the Auxiliary will be sent out from the Executive office in November of each year, with an envelope with the Area representative’s name and address on it so that the $50.00 annual contribution will go directly to the area. It will be the responsibility of each designated Area Auxiliary representative to keep track of past due contributions for their Auxiliary Corps. members.

• Areas will be sent list of members in their areas whose annual contribution is either one or two year delinquent. In addition to the staff of the Association sending reminder notices and calling these members, we would ask each Area Chairman to also contact those on the list and apprise the Executive Director by e-mail of the results of conversations and/or correspondence with these members. The Area Chairs should also let the Executive Director know if any of these members have special circumstances, i.e., illness and/or financial, that would prevent a member from making his or her annual contribution. In these cases, arrangements can be worked out for partial exemptions or longer payment schedules.

• Areas receiving contributions should send letters to contributors and should be signed by either the Area Chairman or Area Treasurer. A copy of the appropriate letter is attached. Areas receiving funds for events should also send a letter at the conclusion of the event stating the amount of goods and services provided at the event. Again, this letter should be signed by the Area Chairman or Area Treasurer (copy of letter attached).

If you have any questions, please feel free to call the Executive Director, Reverend Dr. Jeffrey R. Trexler or Kathy Trabucco, Bookkeeper at 212-371-1522. You may also contact them by e-mail at: jtrexler@maltausa.org or kt@maltausa.org.
<table>
<thead>
<tr>
<th>Date of Receipt</th>
<th>Received from</th>
<th>Reason for Payment</th>
<th>Amount</th>
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Order of Malta – American Association

Area:

Period from: ______________ to ______________

Name of Bank and Account:

Book balance – Beginning of Period ______ $
(date)

Add: Receipts from ______________ to ______________
(see attached schedule for details)

Less Disbursements from ______________ to ______________
(see attached schedule for details)

Other (Describe):

1.
2.
3.

Book balance – end of period ______
(date)

Supporting documents to be attached:

1. Reconciliation of bank to book balance during period
2. Copy of bank statements for the period
3. Copy of any solicitations to members during the period.
4. If applicable, a detailed schedule of any inventories of products held for sale at the end of the period.
<table>
<thead>
<tr>
<th>Date of Check</th>
<th>Check No.</th>
<th>Payee</th>
<th>Reason for Disbursement</th>
<th>Check Amount</th>
</tr>
</thead>
</table>

Order of Malta -- American Association
Schedule of Cash Disbursements
Area: 
Period from:
LETTER FOR EVENT – COST OF GOODS AND SERVICES RECEIVED

DATE

Name
Address
City, State Zip Code

Dear ________________:

On DATE, we received your check no. _____, in the amount of $_______, which represents two reservations (@ $_______ per reservation to NAME, LOCATION AND DATE OF Event). The amount of your payment that is deductible as a charitable contribution for federal income tax purposes is limited to the excess of your payment over the value of goods and services provided to you by this organization at the event. We estimate that the value of goods and services provided is $______.

Please keep this receipt for income tax purposes.

In claiming any charitable contribution deduction, reference should be made to the official title of this Association, which is "Sovereign Military Hospitaller Order of St. John of Jerusalem, of Rhodes and of Malta, American Association, U.S.A."

Thank you for your generous support. It is through the efforts of members such as yourself that we are able to continue to serve our lords, the sick and the poor.

Sincerely,

Name of Area Chairman or Treasurer
Area Chairman or Treasurer
Order of Malta, American Association
Name of Area
LETTER – CONTRIBUTION – NO GOODS AND SERVICES RECEIVED

DATE

Name
Address
City, State Zip Code

Dear __________________:

On DATE, we received your check no. ______, in the amount of $______, which represents a contribution to our organization. The amount of your gift that is deductible as a charitable contribution for federal income tax purposes is limited to the excess of your payment over the value of goods and services provided to you by this organization. We estimate that the value of goods and services provided is $0.

Please keep this receipt for income tax purposes.

In claiming any charitable contribution deduction, reference should be made to the official title of this Association, which is "Sovereign Military Hospitaller Order of St. John of Jerusalem, of Rhodes and of Malta, American Association, U.S.A."

Thank you for your generous contribution. It is through the efforts of members such as yourself that we are able to continue to serve our lords, the sick and the poor.

Sincerely,

Name of Area Chairman or Treasurer
Area Chairman or Area Treasurer
Order of Malta, American Association
Name of Area
Section 13  Area Works and Ministries Profile

THIS IS A SAMPLE - THE FORM WILL BE REVISED FOR THE NEXT EDITION

2008 Works/Ministries Information Form
(Please complete one form for each work or ministry in your area)

Organization:_____________________________ Area:____________________

Contact Person:________________________________ Phone_____________

Type of Project: Malta Ministry

Description of services provided: ______________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Clientele served:____________________________________________________

Estimated number of clients per year:______________________________

Estimated number of Malta Members, Auxiliary, and Volunteers:________

Estimated annual hours of service (in aggregate):________________________

Estimated number of professional staff and volunteers (outside of SMOM):_______

Estimated annual hours of service (in aggregate):________________________

Annual budget of work or ministry:____________________________________

Annual SMOM Contributions:________________________________________
A) SAMPLE INVITATION LETTER TO DAY OF RECOLLECTION

B) SAMPLE INVITATION TO NEW CANDIDATE RECEPTION
SAMPLE INVITATION LETTER FOR A DAY OF RECOLLECTION

You are invited to

A Day of Recollection at St. Methodious Seminary
201 Sentinel Avenue, Westtown, Nebraska

for members of the Order of Malta, American Association and their families

presented by
Monsignor Harry Von Zell, Chaplain, Elm County Prison

Saturday, February 24, 2007
10:00AM – 3:00PM

To reserve a place and to ensure that we have lunch for you, please call the Area chair’s number at (555) 345-1212 or send an e-mail to name@place.com

DEADLINE for registration: February 20, 2007

************************************************************************

Order of Malta, American Association
Area name
XXXX Smith Street
Newtown, Nebraska

Name and Address
Cordially invites you to an
Informational Meeting and Reception
on
Saturday, June 2x, 200x
5:30 P.M.
at
The ZYX Country Club
357 Elm Street, Anywhere, USA

R.S.V.P. by June 1x, 200x – (555) 555-1212
Letter template to send with invitation to prospective members - adjust as appropriate depending on the source of the name.

September 2, 2008

Mr. and Mrs. John Doe
123 Road
Hometown, USA 01234

Dear John:

The Order of Malta is a lay Catholic order of the Church founded in 1099 A.D. in Jerusalem during the Crusades. Its charism is personal sanctification, defense of the Roman Catholic Apostolic faith and service to the sick and the poor. The order has a world-wide membership with headquarters in Rome. In the United States, there are three Associations, the American Association, the Federal Association, and the Western Association with approximately 3,000 members. The American Association, the largest of the three associations, has approximately 1800 members throughout the United States.

The charitable works of the American Association are spread throughout the United States and include areas in both the Caribbean and Central America. Some of the works include pregnancy care centers, Eucharistic Ministries to hospitals, rehab centers and nursing homes, tutoring and mentoring programs for inner-city at risk students, prison ministry programs, interventions at homeless shelters and soup kitchens, as well as assistance to hospitals and schools in Haiti.

The combination of all the good works and spiritual outpourings of the Order are epitomized by an annual pilgrimage to Lourdes. The Association, together with Knights and Dames from all over the world, join together each spring to bring and care for the sick, the handicapped and their caregivers on this journey to the Shrine of Our Lady of Lourdes. It is here, working and praying together, that the lasting friendships are made and energy and enthusiasm for the works of the Order are refreshed. In addition to this exceptional opportunity for spiritual growth, days of recollection, retreats, education in the faith are also made available throughout the year.

The purpose of this letter is to invite you to consider becoming a member of this order of the Church. Your name has been suggested to us as a practicing Catholic who might have an interest in the charism of the Order. Archbishop XXXXXX, the Archbishop of YYYYYY, has lent his support to our efforts to establish the Order’s presence in the greater ZZZZZ area.

We would like to invite you to attend a reception at the Hometown Club in Podunk on April 2 from 6:00 p.m. to 8:00 p.m. to hear a brief description of the history of the Order and its works on behalf of the sick and the poor in this state and country and in other places throughout the world. Following that evening, we will ask you to give consideration to membership in the Order. We are enclosing a small pamphlet which describes the order and its works to give you an opportunity to know about the order prior to the reception on April 2.

Kindly respond either by telephone or email to either one of us.

Joe Smith 123-456-7890 mmm@aol.com
Pete Jones 234-567-8901 nnn@yahoo.com
Roberta White 345-678-9101 ppp@optonline.net

Yours in Christ,
Section 15  

Auxiliary Corps

Auxiliary Corps Chair

Each Area of the American Association who has an Auxiliary Corp. should have an Auxiliary Corp. Chair.

The Auxiliary Corp. Chair is responsible for the Auxiliary Members and their activities of a specific Area.

The Area Auxiliary Chair is an extension of the Area Chair, and thus is responsible to the Area Chair for the Auxiliary Members and their activities in a specific Area.

The Area Chair should either:

a) Appoint a Knight and/or Dame to either be the Auxiliary Corp. Chair

OR

b) Appoint a Auxiliary Corp. member to serve as the Auxiliary Corp. Chair. With this situation, a Knight or Dame should still be appointed to oversee the Auxiliary Chair as well as the Auxiliary Corp. of that given Area.

The Auxiliary Corp. Chair appointment should be a three (3) year term; the chair may be reappointed one time.

Appointments should be reviewed with the Chair of the Auxiliary Committee of the Board of Councillors and the Executive Office in New York should be notified of such appointments.

Initiation Fee and Annual Dues:

Upon completion of the application, the applicant will forward the application along with the Initiation Fee of $100 to the Executive Office in New York.

The application will be processed and a copy of the application will then be forwarded to the Area Chair and the Auxiliary Chair in which the applicant resides.

Annual dues for each member is $50. These dues go directly to the members respective Area. A notice (bill) will be sent to each Auxiliary Member in November. A copy of the notice will also be sent to the respective Area Chair and the Auxiliary Chair in order that the Chairs can see that each member has been notified to pay their dues. The notice will state that the deadline for payment is December 31st. Checks should be payable to the members Area. One notice per year will be sent from New York. It is the Auxiliary Chairs responsibility to see that the dues are paid.
Malta Merchandise General Guidelines

Over the past several years, a number of groups have sold Malta related merchandise as a means of raising funds to support Malta Works. Given the recent surge in interest in this type of fundraising, particularly by the Auxiliary, it has been determined that the establishment of guidelines to govern these sales is necessary. As such, the following General Guidelines have been agreed to by the Chancellor and Executive Director, effective immediately.

Merchandise must be Malta related (i.e. incorporate a Malta recognized logo or religious theme)
Merchandise may only be sold in support of each area’s Malta Charities/Works or to support the works of the area Auxiliary
Merchandise must be of good quality, in good taste, and comply with all the rules and restrictions associated with the use of the Order’s emblems, logos, and copyrights
Plans for the sale of merchandise must be submitted to and approved by the Area Chair and the Executive Director; no merchandise should be ordered before approval is granted. The following information must be submitted:
Identification of the Malta Charity or Work to benefit from sales or a summary of how the Auxiliary group will use the funds
Description of merchandise to be sold, accompanied by a sketch or photo of the product
Financial summary detailing cost of product, sale price, and expected proceeds
Summary of the means by which the sales will be facilitated (e.g. direct mail, internet, table at Malta events)
NB: The organizers of Malta events must grant their approval for sales to be conducted at an event
Identification of the individual(s) that will manage all finances associated with purchasing of the products and sales along with a description of the manner by which payments will be accepted
A report summarizing all sales activity and financials must be submitted to the Area Chair and the Executive Director annually.
Lourdes Merchandise Sales Guidelines

As those of you who have participated in past Lourdes Pilgrimages are aware, the Malta Auxiliary has offered merchandise for sale during the evening receptions as a means of raising funds to support the Auxiliary’s charitable endeavors. Although this started as a small enterprise, the activity has slowly gained momentum with profits from sales in 2007 amounting to just over $14,000.

In the past, the merchandise activities have been loosely coordinated. Starting in 2008 we will introduce a bit more structure around this activity, largely to ensure there is adequate space for the sales during the reception, ample storage for the goods that will be sold, and improved handling of cash and credit cards. The general guidelines governing the sale of merchandise apply with the following Lourdes specific additions:

The sale of all merchandise will be managed and accounted for by the Auxiliary
The ‘Auxiliary Shop’ will be open each evening during the reception preceding dinner at a location designated by the Pilgrimage committee; the sale of merchandise at other times or in other locations (e.g. in the dining room) is prohibited.

50% of the net proceeds from sales will be donated to the Pilgrimage; the remaining 50% will be retained by the Auxiliary to support their Works. Anyone wishing to sell merchandise in Lourdes must obtain the approval of the Executive Director and the Pilgrimage Chairs by April 1st.
Section 17  Policy on Death of a member

ORDER OF MALTA – AMERICAN ASSOCIATION

POLICY ON DEATH OF MEMBER

UPON NOTIFICATION OF DEATH BY FAMILY TO EXECUTIVE OFFICE:

1. The Executive Office will notify the Area Chair of the member’s death.
2. The Area Chair is then responsible for notifying his/her members.
3. The Executive Office will update the records in Raiser’s Edge.
4. The Executive Office will call Grace (Mass Scheduler) at St. Patrick’s Cathedral and set up to have a Mass said on behalf of the American Association within thirty (30) days of the members death. After obtaining the date, a Mass Card will be sent to the family informing them of the date and time of the Mass, if they care to attend. The Executive Office will notify the Area Chair also of the date and time of the Mass. The Area Chair may wish to notify their members if they wish to attend.
5. The Executive Office will then post the notification of the members death on the Associations Website for a period of thirty (30) days.

UPON NOTIFICATION OF DEATH BY FAMILY TO AREA CHAIR:

1. The Area Chair should notify the members of his/her Area.
2. The Area Chair should notify the Executive Office so that staff may update the members records as well as to make arrangements for a Mass to be offered on behalf of the American Association at St. Patrick’s Cathedral. The staff of the Executive Office will send a Mass Card to the family of the deceased as to the time and date of the Mass. The staff will also post the death notice on the Associations Website for a period of thirty (30) days.

FUNERAL PALL:

The American Association has available to those Areas which do not have their own, a Funeral Pall, which can be used at a Member’s Funeral upon the request of the surviving family. The Area Chair should call the Executive Office of this request. The Executive Office will overnight Fed-Ex it to the Area Chair, who will be responsible then to see that it is returned to the Executive Office after the funeral, in order that it could be used by others upon request.

9/11/08
Suggested Protocol for the wake of a Member

The formal presence of the Order of Malta at a wake requires a genuine courtesy call to a responsible member of the family for consent. Securing that, a call should be made to the parish rector in order to ask at what time (if at all) a priest plans to offer prayers at the wake and also the time he suggests for the presence of the members of the Order for participation in prayers. That is another courtesy, in this case to avoid colliding with the priest’s service or permitting a separation between the two prayer services if that procedure is desired by the priest or the deceased’s family. One Knight or Dame or your chaplain should be designated to be in charge of the members’ movements at the wake. It would be appropriate for a member of the Order to do readings and say the Prayer of the Order and other prayers in memory of the deceased member.

Robes at Wakes

If a number of members wish to attend a wake, they should have the option to wear their choir robes (or capes) or not, depending on the wishes of the family. Whatever is suitable should be determined by the chairman or designated Knight or Dame, after conversations with knowledgeable local members and the family. If our members choose to attend a wake in their robes with large crosses, someone must procure for them a private vesting area. It is not becoming to have people being robed in hallways or unsightly places in a funeral home. Please consult the undertaker about the cloakroom facility during the wake.
Section 18

Grant Applications

SOVEREIGN MILITARY HOSPITALLER ORDER OF
ST. JOHN OF JERUSALEM OF RHODES AND OF MALTA
AMERICAN ASSOCIATION, U.S.A.
(ORDER OF MALTA)

1011 First Avenue, Suite 1350
New York, NY 10022

Telephone (212) 371-1522

REGULATIONS FOR APPLICATION SUBMITTAL

The Order of Malta, American Association accepts applications from tax-exempt, non-profit organizations that have a clear, charitable or religious purpose to assist the sick and the poor or have a clear relationship to the Defense of the Roman Catholic Faith. Organizations with active participation of members of the Association receive top priority.

Applications to the Association are considered on their merits; need and good to be accomplished are prime considerations. Since the Grants Committee follows a philosophy of stretching its funds to help as many different activities as it can, the majority of the Association’s grants are usually in the range of $5,000 to $25,000.

SOME KEYS TO REMEMBER:

Applications must be complete when they arrive at the Association headquarters. Incomplete applications will not be considered by the Grants Committee.

The Association’s Grants Committee meets in the spring to consider requests. Completed applications with ALL required information and documents must be received by March 15 at 5PM ET in the New York office. When March 15 falls on a weekend or holiday, the deadline is 5:00 p.m. of the next business day.

Applications are accepted only in the 2-month “window” prior to the deadline, January 15 – March 15.

Information presented to our Grants Committee must be timely. Therefore, applications that arrive either too early or too late for the time period will not be considered.

We urge you to submit your application as early as possible within the window period. Make sure it is complete at the time of submission.

Please do not send extra materials such as dvd's, cd’s, brochures, booklets, folders, bindings or copies as they will not be viewed by the Grants Committee and will be discarded.

<table>
<thead>
<tr>
<th>Computer-Generated Application Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Association will accept Computer-Generated applications.</td>
</tr>
<tr>
<td>If you choose to use this method instead of filling in the Application Form provided, your submission must conform to both the size and layout of the Association’s application form.</td>
</tr>
<tr>
<td>All computer-generated applications must be submitted on 8 ½ X 11 white paper, and cannot consist of more than 3 pages. You should also use the Times New Roman Font, size 11.</td>
</tr>
</tbody>
</table>
FIELDS OF ACTIVITY OF THE ASSOCIATION
The Association has as its purpose to engage in such exclusively religious, charitable, literary and educational activities as will aid the Roman Catholic Church and institutions and organizations identified with it.

The Association has particular interest in projects in which self-help and local support are demonstrated.

IMPORTANT!
The American Association generally does not approve grants for the following purposes:
1. Reduction of debt
2. Tuitions
3. Scholarships
4. Fellowships
5. Endowment Funds
6. Individual Scholarly Research
7. Continuing subsidies of operating budgets/expenses
8. Advocacy, lobbying or legislation
9. Projects which are “after-the-fact” (completed) by the date of the grants committee meeting
10. Grants made by other grant makers

Restrictions of Note
1. Requests by or for individuals will not be considered.
2. Unfortunately, the Association does not have the facility to translate applications materials submitted in languages other than English. In this case, the requests have to be returned to the applicants. To facilitate the processing of your application for review by the Grants Committee, the application must be submitted in English.
3. At the present time, the Association does not accept e-mailed applications. It should also be noted that since the application form itself is copied and sent out to our Grants Committee for review, faxed submissions are not accepted.

PROCESS SUMMARY
• The window to submit grant applications is January 15 to March 15
• The Grants Committee meets in May
• The Board of Councillors reviews the Committee recommendations at its May meeting
• Funds are disbursed in July
INSTRUCTIONS FOR SUBMITTING 2010 APPLICATIONS TO THE ORDER OF MALTA, AMERICAN ASSOCIATION

ALL INFORMATION IS KEPT CONFIDENTIAL.

Your application will be in competition with requests from all over the world.

It is important, therefore, that you provide the following:

1. **APPLICATION FORM** This will serve as a summary of your proposal. Please use the form provided and fill it in completely. Notations such as “see attached” will not suffice, since the form itself will be reproduced and distributed to the Grants Committee. Please submit the original application form, as copies do not always reproduce clearly. Every application to the Association must be submitted on the current year’s application form. DO NOT use any other application forms or accompanying guidelines after the expiration date indicated on the top of the application form. **Incomplete applications will not be considered.**

2. **AREA CHAIR APPROVAL** This may take the form of a signature approval on the application or letter from the local Area Chair of the area where the project will be carried out, commenting upon your request to the Association. A list of Area Chairs can be found on our website: [http://www.maltausa.org/american_leadership_areachairs.php](http://www.maltausa.org/american_leadership_areachairs.php). Applications for national or international projects do not require an area chair signature, although many national and international projects have local area support. Since a primary consideration for approval is the involvement of American Association members, national and international projects must include information regarding the involvement of members. If members are concentrated in a particular area, the signature of that area chair will lend weight to the application.

3. **DETAILED BUDGET** A detailed breakdown of the cost elements and sources of income of the program/project for which funds are being requested for the past two (2) years.

4. **FINANCIAL STATEMENT** The latest 12-month accounting of the incorporated organization that will conduct the proposed project, including a balance sheet (assets and liabilities) and an annual operating statement (income and expenses) – or the latest 12-month auditor’s report with accompanying notes.

5. **BOARD OF DIRECTORS** A listing of the officers and Board of Trustees or Directors. If there are any Knights and/or Dames of the Association, please indicate with KM or DM after his/her name.

6. **MEMBERS OF THE ASSOCIATION** A listing of members of the Association who are engaged with their duties or work.

7. **MISSION STATEMENT** of your organization.

8. **LAST IRS FORM 990 FILED** A copy

9. **IRS TAX EXEMPT APPROVAL LETTER** A copy (USA applicants only)

10. **OPTIONAL NARRATIVE.** A supplemental Narrative may be submitted and is recommended. It should explain the project in greater detail. It may also include any other information that you feel is important (Not to exceed 1 typewritten page).

**Note:** Incomplete applications, or applications arriving too early or too late, will not be considered. Please see the cover letter of this mailing for more details.

ALL APPLICATIONS FOR LOCAL PROJECTS MUST BE SENT DIRECTLY TO THE LOCAL AREA CHAIR. NATIONAL OR INTERNATIONAL GRANT REQUESTS MAY BE SUBMITTED DIRECTLY TO THE NEW YORK OFFICE. Please see the attached listing of area chairs for contact information.
SOME GUIDELINES THAT MAY BE HELPFUL WHEN COMPLETING THE GRANT REQUEST APPLICATION

1. **Amount Requested.** The amount to be requested from the Association should be exactly what is required to get the project underway…or what is required to meet a specific, essential need…or what is needed to move the project forward to the next step.

2. **Introduction.** This serves to describe your organization, its mission and achievements. What needs to come across is a clear sense of its track record and competence in the activity or area for which funds are being sought.

3. **Specific Purpose.** A good proposal will be exact not only about the amount of money it seeks, but also the purpose for which the money is needed. Don’t confuse “purpose” with project “goals” or with “methods”. “Purpose” almost always relates to “means”, not “ends”. Thus, here you should state clearly what it is you are asking the Association to assist you in acquiring or in doing. (For example: “To buy a 4-wheel drive ambulance”.) **Your answer should be brief, using no more than 30 words.**

4. **Problems, Objectives & Methods.** Here, describe the basic problem or need…what it is you want to accomplish…and the method(s) you plan to use. It is important to demonstrate that the problem or need is real and currently not being met by others.

5. **Timing.** Is the project “ready to go”…already in progress…or only in the idea stage? Be specific as to the status, date and/or time frame of the project, as this is an important element of consideration.

6. **Cost and Financing.** List the costs of the project. State how much has been raised toward the total needed, how much still needs to be raised, and other sources of support to be sought. In the event the Association cannot grant the amount you are requesting, is there a smaller amount which can be used to move the project to the next stage?

7. **Evaluation.** Will the project have a tangible measurable outcome? What methods and measurements will you use to evaluate the project? How will you be able to prove that you have gotten the results you want? Do your measures focus on ends, not means?
NAME AND ADDRESS OF TAX-EXEMPT ORGANIZATION SUBMITTING APPLICATION:

Name: 
Street: 
City: State: Zip Code: 
Phone Number: Fax Number: 

Amount Requested: $ For Fiscal Year: 
Total Project Cost: $ Amount Requested/Other Sources: $ 
If amount requested cannot be granted, what amount would be helpful to move the project forward? $ 

CONTACT PERSONS:

Name of American Association Sponsor: 
Phone Number: Fax Number: 
Name of Executive Director: 
Phone Number: Fax Number: 

* * * * * * * * * *

Has this organization ever applied to, or been funded by the American Association?

□ YES □ NO

AREA CHAIR APPROVAL

Area where project will be carried out: 
Signature: DATE: 
Area Chair
1. **INTRODUCTION** – Give brief description of the major goals of the organization; describe the population served and the actual number of clients served in the past fiscal year:

2. **SPECIFIC PURPOSE** – In 30 words or less, give the specific purpose for which funds are being sought:

3. **PROBLEMS, OBJECTIVES & METHODS** – Give a brief description of the basic problem or need…describe what it is you want to accomplish…and method(s) you plan to use.

4. **TIMING** – List the date(s) or time frame of the project. Give its current status, indicating how long it will take to finish and whether there are later stages.
5. COST & FINANCING – List the principal cost elements of the project & indicate the total cost.

What funds have already been obtained for this project? Please list all sources of funding. Indicate how much has been raised locally or from your own constituency. Finally, list the funds still to be raised and from where you hope to obtain them.

When will project be self-supporting?

6. EVALUATION – Explain how you will determine that you have accomplished what you want to do.

I certify that all information submitted in application for funds from the Order of Malta, American Association is accurate.

If approved, below please print or type the name and address of the person whom the Area Chair should deliver check to.

NAME OF RECEIVER OF GRANT CHECK: ________________________________

TITLE: _____________________________________________________________

ADDRESS: _________________________________________________________

SIGNATURE: ________________________________    DATE: __________
ORDER OF MALTA – AMERICAN ASSOCIATION

POLICY FOR SUBMITTING GRANTS BY THE AREA CHAIRS

Each Area is required to form a Grant Sub-Committee

This committee has the responsibility of assisting the Area Chair to review Grant Applications being submitted by members of a particular Area. The purpose of this sub-committee is to help insure that the grant being applied for meets all of the Association’s Guidelines, and is worthy to be submitted to the Grants Committee of the American Association for its review. Upon the Area’s Grant Sub-Committee review and endorsement, the grant is then forwarded to the Area Chair for his or her approval before being then forwarded to the Grants Committee of the American Association.

Area Chair must sign each Grant Application*

In order that a grant may be considered, it must be signed by the Area Chair in which the grant originates. Your signature represents your approval to have this grant be considered by the Grants Committee of the American Association.

Area Chairs should only sign and submit a Grant Application that he/she fully supports.

If an Area Chair is submitting more than one Grant from its Area:

It is requested that the all grants being submitted from a particular Area be sent to the Executive Office in New York as one batch/packet. A letter from the Area Chair must accompany the grant applications.*

The Area Chair letter should state how the grants should be prioritized; by ranking them in number, as well as the amount of money it feels should be awarded to each grant it submit from its Area. Since there are limited funds that are allocated each year, as compared to the total amount of grants being submitted, the letter will be a key factor in assisting the Grants Committee in determining which grants, as well as their amounts, that will be proposed to the Board of Councillors for final approval.

If you have any concerns or questions, please feel free to contact the Grants Committee Chair or the Executive Director.

*BOC approved 5/20/09
2009 GRANT FOLLOW-UP INFORMATION FORM
(Please Print or Type)

****************************************************************************
GUIDELINES***

1. For each grant awarded, the Area Chair or designee is to schedule a follow-up visit to ensure the correct usage of monies issued. Report is due by December 31 to the New York Office, whether you meet or not. If you cannot meet, you should conduct a phone interview.

2. Review the grant application to ensure you are familiar with the request for which the grant was approved before conducting interview.

3. The Area Chair can designate someone else to visit the organization and complete the form.

ORGANIZATION NAME OF AGENCY AND/OR POPULAR NAME:

Name: __________________________________________

Street: _________________________________________

City: ________________ State: _____ Zip Code: __________

Tel: _______________ Fax: _______________ Email: _______________

Amount of Grant Approved: _________________________

Purpose of Grant: _________________________________

Contact Person: _________________________________

Date of Follow-up Visit to Organization ______________
1. Did the organization spend the money which they received for the grant?
   □ Yes  □ No
   a) If no, when do they expect to spend the money?
   b) If yes, when did they spend the money?

2. Was the purpose for which the money was spent realized? (For example, if the money was spent to buy a van to pick up elderly people for medical appointments, are elderly people being picked up by the van for their medical appointments?)

3. Were you able to personally observe the result of the grant's expenditure? (e.g., did you see the van?)

4. Did you observe any issues or concerns about the organization?

5. Does the organization appear to be well-managed?

6. If the organization comes forward with a grant request in the future, do you believe the American Association should consider future grants to this organization?

Any other comments and/or observations:

Name of Interviewer

PLEASE PRINT

Title