

**Sovereign Military Hospitaller Order of Saint John of Jerusalem of
Rhodes and of Malta**

American Association

Area Leadership Handbook

(revised June 2024)

Sovereign Military Hospitaller Order of Saint John of Jerusalem of Rhodes and of Malta

American Association

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**Area Leadership
Handbook**
(revised June 2021)

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Section 1 Area Chair Appointments & Responsibilities

Revised June 2021

1. Overview

- a. Areas are composed of all members of the Association whose primary address is within 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 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, an Area Membership Chair, Area Communications Chair, Area Auxiliary Chair, other designated members, and an Area Chaplain, who works with the Area leadership to support the spiritual life of the members of the Area.

2. Appointments (from the American Association By-Laws, Article III, Section 10, approved June 2018)

- a. “The Board of Councillors may establish regional Areas of the Association. Area Chairpersons may be appointed by the President, subject to approval by the Board of Councillors.
- b. Prior to the 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. In extraordinary circumstances, with the recommendation of the President and the approval of the Board of Councillors, an Area Chairperson may remain in office until another qualified candidate is identified.
- c. The Area Chairperson will appoint an area member to serve as Area Hospitaller, subject to approval by the Board of Councillors. The Area Chair may appoint other Chairs as appropriate including an Area Treasurer (subject to the approval of the Executive Director for a three-year term, with one additional three year term), Area Membership Chair, Area Grants Committee Chair and Area Auxiliary Chair. The Area Chairperson reports to the President and is responsible for carrying out the plans of the Association as they relate to the Areas and for promoting broad interface between the Areas and the President, the Chancellor, the Hospitaller, and other Area Chairpersons. The Area Chairpersons have the responsibility to further the charitable, religious, and beneficent works of the Association within their respective regional areas, and to assist the President and the Board of Councillors in the effective administration of the Association. The provisions of Article III, Section 10 shall be construed to permit appointment of Area Co-Chairs and Area Co-Hospitallers”.

3. **Responsibilities of the Area Chair:**

- a. 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 will 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.
- b. He/She will have responsibility to further the charitable, religious and beneficent work of the Association.
- c. He/She will arrange for projects and activities in which members can be involved in “hands-on” work. 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 24, Feast of Our Lady of Philermo, on September 8, World Day of the Poor in November, and World Day of the Sick on February 11) as well as other spiritual activities to support each member’s spiritual growth.
- d. 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.
- e. He/She will work with the Area Chaplain to schedule liturgies, 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.
- f. He/She will be responsible for developing 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 qualified candidates for membership.
- g. He/She will establish a Year of Formation program for all candidates seeking membership in the Association, incorporating the Association’s online year of formation program.
- h. 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.
- i. He/She will establish a plan of communications that may include a newsletter, a webpage on the American Association website, an Area Facebook page, e-mails, phone calls, and other means to enhance the Area’s effectiveness.
- j. He/She will provide and update an annual calendar of activities, spiritual and social, for all members and for candidates for membership. He/she should coordinate with the Association calendar to avoid calendar conflicts wherever possible.
- k. He/She will encourage the development of the Association’s Auxiliary within the Area.
- l. 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 year of formation or in the first

three years of membership. If a candidate cannot participate in the Lourdes pilgrimage, the Wisconsin pilgrimage to the Shrine of Our Lady of Good Help is an acceptable alternative until the member can attend the Lourdes Pilgrimage.)

- m. He/She will encourage members to support the fundraising efforts of the Association, organizations supporting the work of the Association and work of the Order.
- n. He/She will encourage membership participation in events sponsored by the Association.
- o. He/She will participate or appoint a designee to participate in the Annual Business meeting, the Annual Investiture Liturgy, the Annual Area Chair Meeting, and in meetings called by the President of the Association.
- p. He/She will provide to the Association's Executive Director quarterly financial statements detailing the financial activities of the Area in a form determined by the Executive Director and the Treasurer of the Association.
- q. See [Appendix I](#) for a timeline of Area Chair Responsibilities.

4. Responsibilities of the Area Communications Chairs

This is a general description; some aspects may not apply to every Area.

- a. Some Areas have an Area Communications Chair designated by the Area Chair. 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. If there is no Area Communications Chair, this description more fully describes the Area Chair's communications responsibilities.
- b. Some specific responsibilities of the Communications Chair:
 - i. Assists the Area Chair by coordinating the development and distributing the Area calendar.
 - ii. Prepares communications for the Area Leadership to distribute based on specific actions and activities that 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, Wisconsin Pilgrimage, the Investiture, the Association election, major fundraising activities, Area fundraisers and social events.
 - iii. Works with appropriate leaders or committees to develop materials and schedules for Year of Formation activities.
 - iv. 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.
 - v. Works with Area Leadership to encourage Area Members to provide e-mail addresses to the Association to facilitate quick and low-cost communication.
 - vi. Maintains Area roster and communicates changes to the NY office when appropriate regarding changes in membership status.
 - vii. Develops communications materials about Area projects, activities and other news and events for members, for the press as appropriate and that must be reviewed by the Executive Director before going to any public media, and for the Association's leadership.
 - viii. Provides communications material for inclusion in Association communications (e.g., SIA weekly, website and periodic special communications projects).

5. Responsibilities of the Area Membership Chair

This is a general description; some aspects may not apply to every Area.

- a. 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 American Association office in NY 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.
- b. 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.
- c. Some specific responsibilities of the Membership Chair:
 - i. Assists the Area Chair by managing a team of Area Members whose responsibility it is to identify potential candidates for membership.
 - ii. 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.
- iii. Works with the Communications Chair and the New York office to develop and to assemble materials that can be shared with potential candidates.
- iv. Works with Area sponsors and candidates in their Year of Formation 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.
- v. Works directly with the Area Hospitaller, members, chaplains, and parish clergy to identify projects that will provide members and prospective members with the opportunity for hands on work helping the sick and the poor and giving witness to the faith.

6. Responsibilities of the Area Hospitaller

- a. The Area Chair appoints the Area Hospitaller(s) subject to the ratification by the Board of Councillors. The Area 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 projects and activities or participation in established activities.
- b. Possible Area Hospitaller Responsibilities:
 - i. The Area Hospitaller will assist the Area Chair by identifying new projects that may be adopted within the Area and assisting in the planning and implementation of these programs.
 - ii. The Area Hospitaller will work to strengthen existing activities and to engage the current members and candidates in formation in active participation and hands-on work.
 - iii. The Area Hospitaller will apprise the Area Chair on the progress of the development of such activities and will keep the Area Chair and the Hospitaller of the Association informed as to the status of these programs.
 - iv. The Area Hospitaller will assist the Area Chair in encouraging members and candidates in formation to participate in the annual Lourdes Pilgrimage (a work of the Order), and the Our Lady of Good Help Pilgrimage, to participate in other activities and events sponsored by the Association, and to support the works of the Order as a whole, including Prison Ministry and outreach to the Order's international works.
 - v. The Area Hospitaller will be actively involved with the Area Chair and the membership committee in sharing information about the projects and activities with prospective members.
 - vi. The Area Hospitaller will 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.
 - vii. The Area Hospitaller will assist the Hospitaller of the Association in arranging for visitations to the Area for the purpose of supporting the activities and projects of the Area.
 - viii. The Area Hospitaller will 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. The Area Hospitaller will encourage members and year of formation candidates to attend an Association three-day retreat.
 - ix. The Area Hospitaller works directly with Area members, chaplains and parish clergy to identify projects already in operation where members and prospective members will have the opportunity for hands on work helping the sick and the poor and giving witness to the Faith.
 - x. The Area Hospitaller will 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 all Association guidelines.

xi. The Area Hospitaller will support and share efforts to complete and update the Association's Spirituality in Action Resource Guide and to provide Area activity photos regularly.

7. **Chaplains** – Chaplains are an integral resource for the area. They can suggest candidates for the Order and they should enhance the spiritual offerings of the area. The duties of a Chaplain specified in the American Association Policies and Guidelines for chaplains are: • to participate in the celebration of the rites on the liturgical feasts, at meetings and during the Pilgrimages; • to give spiritual assistance to the movements and works of the Order and to the initiatives sponsored by the Order; • to provide that the members of the Order receive all spiritual aids, particularly in case of sickness; • to promote spiritual retreats, especially during the liturgical periods of Advent and Lent; • to study in depth the specific spirituality of the Order, by promoting also the celebration of the Feasts and the Memorials of the Saints of the Order, by using the Missal of the Order, always respecting the mandatory norms; • to help organize annual or bi-annual courses of religious education and spiritual formation for Knights and Dames, as appropriate, and for those who, though not belonging to the Order, carry out their work in the Order's activities; • whenever there are no special pertinent directives, the Chaplain should strive to take part in the religious ceremonies, the Pilgrimages and the various meetings organized by the respective Authorities of the Order; • to exercise the role of "Ecclesiastical Assistant" in the various groups or entities of the Order, in particular in the volunteer groups and the youth groups.

a. How many? Some areas have only one chaplain. Given the nature of the duties of a chaplain, as noted above, one is probably not enough. In order to fulfill the spiritual needs of the area through masses, retreats, days of recollection, etc., it is likely that several chaplains will be necessary.

b. What characteristics. The role of the chaplain is to further the spiritual growth of members of the Order. He should be a good homilist, a good teacher, a good spiritual advisor. He does not need to be good at raising money or building buildings, but it certainly helps if he gets along well with people. He does not need to be a pastor.

c. How to appoint. To appoint a new chaplain, you write a letter to NY requesting his appointment. The letter must include the candidate's CV, a copy of his certificate of ordination and a letter of approval from his bishop or provincial. The request is reviewed by the Board of Directors and then goes to Cardinal Dolan for final approval.

d. What are the different designations of chaplains? There are four main chaplain designations: Conventual Chaplain ad honorem (bishop), Magistral Chaplain (permanent), Deputy Chaplain (3-year term, may then be recommended for appointment as Magistral Chaplain) and Deacon Deputy Chaplain (deacon appointed for renewable three-year term).

e. How to involve (spirituality, recruiting). Make your chaplain(s) a part of the planning process for your spiritual activities. You should invite your chaplain(s) to participate in your leadership meetings. Perhaps you rotate who comes, or ask each chaplain to serve for a year, allowing all of your chaplains some input into the planning of your area. Chaplains can help with topics for programs, with presentations, etc. They should celebrate your masses with you. They can help with recruiting in three ways – they can present information on the spirituality of the order during recruiting information sessions, they can provide leads to potential candidates in their parishes and they can sponsor candidates, with a co-sponsor.

Section 2

Membership

A growing membership is key to the success of an Area. There are a few tried and true organizational approaches that have proven to be important.

1. **Appropriate Candidates** – Appropriate candidates are practicing Catholics in good standing who have the time and who have a genuine desire to grow spiritually-by participating in activities focused on giving witness to the faith through hands-on service to the sick and the poor. They must not have been divorced and remarried unless the first marriage has been annulled. They should not be members of other orders; institutions or communities whose obligations make it difficult to participate fully in the Order or that are hostile to the church or the Order. They should not have spoken or written publicly in opposition to Catholic teaching in the area of faith or morals. See [Appendix 2](#) for a description of the expectations, responsibilities and obligations of members of the Third Class, which is the class of all new members.
2. **Membership Committee** – A membership committee can assist the Area Membership Chair by contacting potential candidates and by being a resource for Area recruiting events. Members of the committee can, for example, be presenters on various topics at information nights. Some people may be reluctant to approach a potential candidate but may be willing to provide a name. A member of the committee can then approach that person.
3. **Membership Plan** – Having a plan is a good way to start the recruiting process. Elements of the plan can include the sources of candidates you intend to use. Will you be talking with the bishop(s), with the pastor(s), with the heads of parish organizations? What other sources will you tap? How will you involve your members in recruiting? Do you have members on the boards of Catholic organizations such as Catholic Charities, St. Vincent DePaul, the Catholic school, etc.? How will you energize your membership to propose candidates? Will you have recruiting events, such as in-home information nights, or cocktail parties at a local venue. See [Appendix 3](#) for a sample invitation to an information night. See [Appendix 4](#) for suggestions on organizing an information night. The membership committee should assist the membership chair to develop the plan. Brainstorming may generate more ideas.
4. **Application Process** –
 - a. **Timeline: The entire application process is conducted online. No paper applications are accepted.** An outline of the process is attached in [Appendix 5](#) for your information. Recruitment is a year-round activity, but there are several important dates. The first step of the application process is the Pre-Screen Questionnaire, which is to be filled out by the sponsor. This form covers general information about the candidate and their interest in the Order. After this form is approved by the NY Office, the candidate is invited to begin Part 1 of the application, submit a refundable Passage Fee deposit, and begin the Year of Formation online course. Part 1 of the application, the certificates (baptismal, marriage, RCIA, annulment), and the Passage Fee deposit are due by November 1 of the year preceding expected investiture. Part 2 of the application, along with the approval of two sponsors and the Area Chair, the pastor's recommendation, the bishop's approval, and completion of the online course is then due by April 1 of the year of the expected investiture. The remaining Passage Fee balance is due by April 30. [Maria DiGiacomo](#) in the NY office sends out a spreadsheet starting in November that shows the status of all candidates' applications. There is also a spreadsheet on the status of each candidate in the 'members only' section of the website that is for Area Chairs and Area Membership Chairs to use as a regularly updated information source. It is the job of the membership chair to follow up with candidates whose applications are not progressing.
 - b. **SurveyMonkey Apply:** The application process is hosted online on SurveyMonkey Apply. The Area Chair's only required participation in the process is to review and approve the candidates'

applications when he or she is notified that there are applications available for review. The Area Chair and Area Membership Chair can, however, access the applications through Survey Monkey in order to track their progress. The Area Chair, Sponsors, and Candidate must have a SurveyMonkey Apply account to engage in the process. [Tiffany Mazza-Dowd](#), in the NY office can help you set up your Survey Monkey account if you do not have one.

- c. **Year of Formation Program** – Once a candidate has submitted an application, the year of formation begins. There are three aspects to the year of formation. The first is the online course material, which the candidate must complete by April 1 of the year of the expected investiture. The second is participation in Area activities. Our goal is to have active members. The year of formation gives us the opportunity to see whether the candidate is committed to working with us in our ministries and attending our other activities and events. The third aspect is in-person checking in. The Membership Chair, the Area Chair and the candidates' Sponsors should each meet with candidates two or three times during the year to answer questions and gauge the candidates' continuing engagement. These meetings should be spaced to ensure six or more points of contact, not including the normal contacts that occur during projects and spiritual events. See [Appendix 6](#) for a detailed description of the Year of Formation.
5. **Record keeping** – The Area should maintain a database, spreadsheet, or other list of all potential candidates, including sponsor/contact and result of contact. The data can be used to follow up periodically with potential candidates who have declined. For example, a candidate who declines because of work or family commitments may be more interested once the last child goes to college or when the job changes, the business is sold, or retirement occurs.

Section 3

Hospitaller Activities

1. A primary function of the Area is to provide opportunities for its members to engage in works of service to the sick and the poor and defense of the faith. Membership surveys confirm that members join the Order to work. One of the reasons most often mentioned for dissatisfaction with the Order is that “we never do anything”. It is critical to both recruitment and retention, as well as to fulfilling the mission of the Order, that the Area have a vibrant program that promotes members’ spiritual growth through opportunities for hands-on works and works in defense of the faith. It is the role of the Area Hospitaller, working with the Area chair, to develop and support the Area’s works.
 - a. Spirituality – There are many ways to support the spiritual growth of Area members. Many Areas schedule regular masses, often on the first Friday of the month. Some Areas have their masses in the early morning before work and others do them in the evening. They can be followed by a breakfast or dinner. The Association requires attendance at a special mass to celebrate the feast of St. John the Baptist on or about June 24 and encourages celebration of the Mass for Life, World Day of the Sick and World Day of the Poor. The Association also requests Areas to hold Days of Recollection for Advent and Lent. Finally, the Area can have a mini retreat. Area members are encouraged to attend Association three-day retreats in the fall and winter in either New England or Florida.
 - b. Defense of the Faith – Defense of the faith can take many forms.
 - c. Pro-life activities – Participation in the annual March for Life is clearly defense of the faith. At the Area level we can participate in 40 Days for Life. Some Areas pray the rosary on the sidewalk outside Planned Parenthood or other abortion facilities.
 - d. Educational programs – Some Areas conduct seminars or symposia on topics of current interest – e.g., euthanasia, gay rights, gender identity, Humanae Vitae, Ethical and Religious Directives for Catholic Healthcare Services, etc. – or on core elements of the faith – e.g., the Trinity. Speakers may range from the Area chaplain(s) to experts from around the country, e.g., the National Catholic Bioethics Center. The Association is in the process of developing a list of speakers who have been used successfully in different Areas. In the meantime, contact the New York Office, who will refer you to a member of the Area Support and Development Committee for help.
 - e. Hands-on Works –
 - i. Examples – Our hands-on works are those that serve the sick and the poor. There are many examples of those works, such as service in a soup kitchen, a food pantry, a medical clinic, etc. You, the Area Hospitaller and your leadership team can identify needs, based on your knowledge of your Area and your contacts with nonprofit organizations such as Catholic Charities, and develop activities based on those needs. You should keep in mind the Association’s four signature priorities, prison ministry, right to life, end of life and human trafficking. It is important to take into account the demographics of your membership. Do you have retirees who can staff projects during weekdays? Do you have working people who can only volunteer in the evening or on weekends. Is the Area geographically dispersed and, if so, can you offer activities in a variety of locations? You receive an annual Area Support payment from the Association. That money can be used in your works, for example for supplies to

support a specific project. Our most successful works are often those that contain three elements – spirituality, service and camaraderie. Our members are, by nature, workers. They are Eucharistic ministers, Eucharistic ministers to the homebound, tutors, mentors, etc. Those are all very important individual ministries that do not require the involvement of the Order. Prison ministry-is an individual ministry-for which the Order provides necessary support.

- ii. Ministries that give our members the opportunity to come together as members of the Order are what help us develop as a community. Starting a project with the daily prayer of the Order, or, better yet, a mass, reminds us that our work is for our spiritual growth, our path to sanctification for the glory of God. Working together provides the camaraderie that strengthens our bonds to the Order. Some projects even conclude with fellowship – a meeting at a local pub. The Lourdes Pilgrimage is a prime example of a work that encompasses all three elements.
 - iii. Spirituality in Action Resource Book – The works of each Area are published in the Association’s [Spirituality in Action Resource Book](#). You can use the Resource Book to generate ideas about what ministries you might be able to implement in your Area. **Note that your Hospitaller should keep your Area’s activities up to date in the book using the online form, a copy of which is attached as [Appendix 7](#).**
 - iv. Warning – Works of the Order are works that we manage. Do not describe other charities that our members volunteer in or contribute to as works of the Order or Area Ministries. Do not permit third parties to use our insignia and logo in their activities.
2. **Resources** – American Association staff and leadership are available to help plan and carry out Area events. See [Section 7](#) below for a list of staff and leadership.

1. **Financial Responsibilities** – The Area Chair is responsible for the finances of the Area. The Area should have one bank account. If an Area thinks they need more than one bank account, they should consult the Executive Director who would make the final decision. The Area Chair determines how the Area finances are being handled. Be aware of what money comes in. The Area is permitted to collect Area dues, but many Areas do not do so for practical reasons, finding it easier to finance operations through event fees and Area Support payment from the Association. The Area needs a process for handling event fees and donations and for making deposits and paying expenses. It may be helpful to have a budget, particularly to decide how the Area will spend its Area Support payment.
 - a. **Treasurer** – Each Area is required to have a treasurer. An Area Chair can recommend a member of their Area for approval by the Executive Director for a three-year term. The Area Chair may request one additional three-year term if the Area Treasurer is fulfilling his/her duties to the satisfaction of the Executive Director. The Treasurer’s position may not be renewed for more than two three-year terms. The Area Chair and Treasurer should plan how to divide financial responsibilities.
 - b. **Bank Account** – The Area bank account is required to have two local signatories (the Area Chair and Area Treasurer) and two signatories from NY (the Association Treasurer and the Association Executive Director).
 - c. **Bookkeeping** – The Area should have a system to keep track of Area financial transactions. If the Area is smaller, with few transactions, an Excel spreadsheet may be sufficient. Larger Areas with more transactions may use a software package like Quick Books.
 - d. **Reports** – The Area must file financial reports with [Jacqueline Finnen](#) on the 15th of the month following the end of each calendar quarter. The 4th quarter report is requested by January 10 to facilitate compilation of the Association’s annual financial statements on a timely basis). See the Association’s financial policy below. The forms used for the filings are available online under the Area Leadership Resources/Accounting tab and in the attached accounting appendix, ([Appendix 8](#)).
 - e. **Dues**– Some Areas charge members’ dues apart from the Annual Contribution paid to the Association. Those dues are typically in the \$50-\$200 range annually. The Association does not take a position of whether an Area should collect dues. The Area Support payment mentioned earlier might make it possible for Areas to avoid charging dues.
 - f. **Annual Contribution** – Each member’s annual contribution (currently \$1,750) is due by January 31.
 - i. **Area Support payment**– The Area Support Payment is also based on the number of full dues paying members. You receive \$100 for every member who pays his or her current dues by January 31. This is money that can be used for Area expenses, such as postage or software licenses. It can also be used to start ministries, for example by funding initial supplies. Note that current Annual Contributions paid late, up until May 31, earn a reduced payment of \$50 and current dues paid after May 31 do not earn any payment.

- ii. Following Up on Annual Contributions. You will receive information periodically from the New York Office on the status of Annual Contribution payments in your Area.
 - i. It is appropriate to communicate with members who have not yet made their Annual Contribution payments to remind them of the dual benefits that accrue to the Area if their payments are made by January 31. Occasionally, you may hear from a member that because of a change in circumstances he or she is having difficulty making the payment. You should make the member aware that special arrangements can be made by talking with Dr. Jeffrey Trexler in NY. He will gather information and then bring it forward to the Accommodations Committee of the Board, who will review the information and render a decision
- g. Donations/Receipts – When the Area receives a donation, a receipt should be issued to the donor for tax purposes. A COPY of the receipt should be sent with the Area Quarterly Reports to Jacqueline Finnen at the NY Office. Samples of such receipts are attached in [Appendix 8](#).

2. American Association Area Finance Policy and Guidelines

- a. Area Chairs are responsible for managing funds which are derived from grants and contributions from the American Association as well as donations and other contributions from other sources including Area members. The purpose of these funds is to further the mission of the American Association at the local level. Therefore, there should not be an accumulation of cash above the \$50,000 level. The Area Chairs, subject to the provisions of the Area Leadership Handbook including oversight by the Association, have broad day-to-day authority over the use, disbursement, and accounting for their funds. The following protocols have been instituted to ensure the integrity and accountability of the Area Chairs for managing these funds, thus reducing the risk of misuse and misappropriation.
- b. Any exception to this policy must be approved by the President of the Association and must be fully justified and documented. The Area Chairs are free to implement additional internal controls consistent with this Policy.

3. American Association

- a. The Association shall ensure the regular internal audit of Area financial activities. The American Association will establish an audit plan which will randomly select Areas to be audited. The plan will allow for each Area to be audited at a minimum of once every 3 years. A written report will be issued to the Area Chair, the Association's President, Treasurer and Executive Director.
- b. Any material discrepancies found will require a response and Plan of Corrective Action from the Area Chair.
- c. The Association Executive Director or Designee shall have electronic access to the bank accounts for each Area.

4. Area Chairs

- a. Quarterly financial statements shall be submitted to the Association's Controller by the 15th day of the month following each quarter (Q4 submissions should be made by January 10). The statements should include the

applicable receipt and disbursement logs. Monthly bank statements and those that also include copies of cancelled checks should also be sent in quarterly.

- b. Cash received at events must be deposited to the bank account. Cash on hand must not exceed \$500.
 - c. The Area Chair must provide a justification and purpose for approval by the Executive Director for any funds accumulated over \$50,000 in combined cash balances at all Financial Institutions at the end of the fiscal year, December 31st.
 - d. The 15th day after each quarter is a critical date for submission of financial data. All Areas operate under the financial umbrella of the Association and, therefore, all their financial activities must be included in the Association's financial statements. Any exceptions of submissions hold up the issuance of the Association's financial statements. We appreciate your adherence to this deadline.
 - e. All reports must be cosigned by the Area Chair and Area Treasurer prior to submission to the Association office. This report shall include a statement that the financial statements have been reviewed by each and appear after reasonable due diligence to be in order.
 - f. The Area Chair shall have ultimate responsibility for the financial affairs of his or her Area but shall appoint a Treasurer who shall be responsible for the day-to-day financial books and records of the Area including preparing budgets and other necessary functions.
 - g. The Area Chair shall endeavor to ensure that the Area Treasurer is qualified and experienced in financial matters and otherwise shall communicate regularly with the Treasurer concerning the Area's financial books and records and any other financial matters.
 - h. Area Treasurers shall serve in that position for three years and could be granted a second term with the approval of the Executive Director.
 - i. The Area Chair and Area Treasurer must sign all checks and disbursements over \$2500. Disbursements below \$2500 will require a single signature combined with an electronic approval from either the Area Chair or Area Treasurer depending which person is signing the check. Such dual signature authority shall be evidenced by appropriate signature cards on file with the bank where the funds are maintained. No other Area Member shall have the authority to transact any business with the accounts.
 - j. Internal audits will periodically be conducted by an independent person appointed by the Executive Director.
 - k. The Area Chairs shall report any material discrepancies in their financial records or otherwise relating to the funds immediately to the Executive Director. Notification must be made within one business day to the Executive Director or the Association's Treasurer via telephone or email. A written report may be requested by the Executive Director. Legal counsel may be sought with the approval to the Association's President.
5. If any of these procedures contradicts any procedures set forth elsewhere, these procedures shall govern unless stated otherwise by the Executive Director.

Section 5

Meetings and Communications

Meetings, events of various kinds and communications foster a sense of community in an Area. All are essential to the vitality of the Area.

1. **Area meetings** – Each Area is encouraged to sponsor a number of 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 and suggestions. Some examples of Area meetings are:
 - a. Area periodic mass, breakfast/luncheon/dinner, and meeting (annual, quarterly or monthly)
 - b. Forums
 - c. Education sessions
 - d. Retreats and days of recollection (see [Appendix 10](#) for how to set up a day of recollection)
 - e. Planning meetings for projects/activities
 - f. Preparation meetings for Lourdes pilgrims

2. **Communications** -The Area is tied together with communications. The Area should have an Area database and mailing list.
 - a. **Use of mailing list** - One very important point is that the use of the mailing list is limited as a matter of Association policy to Order of Malta business. Many organizations would like to solicit our members. You will frequently be asked to send a communication on behalf of such organizations. Do not do it! Even if Catholic Charities makes the request, do not agree. Once you start, there will be no end. Remember, you can support local charities where your members volunteer through the grants program, but you should not solicit your members for contributions on their behalf.
 - b. **Periodic (e.g., monthly newsletter)** – Having a periodic communication of some kind helps to tie members to the Order. It lets them know what is happening and reminds them of activities that they may want to participate in. If members do not hear from you regularly, they may well forget that you are there. If you have a communications chair, you can delegate the task of preparing and distributing your monthly newsletter. The newsletter should also be published on the Area website.
 - c. **Episodic (e.g., events)** – Most Areas use e-mail to communicate about specific activities. You will want to invite members to events, some of which may require advance registration. Some ministries may be open to only a limited number of participants, so you will want to know who is coming. An events coordinator can help with the logistics.
 - d. **Resources** – To help with communication needs there are a variety of resources. Some Areas use Constant Contact to manage their e-mail communications. Others use Mail Chimp. To organize events, Sign Up Genius is helpful. You can get information on each of these resources from [Tiffany Mazza](#) in the NY Office.
 - e. **Area website** – Each Area has a website accessed through the American Association website. The Area website includes an overview of the Area, the Area calendar, a listing of Area leadership, Area news (like the Area newsletter) and a listing of the Area’s works. Instructions on how to use the website are available from Tiffany Mazza-Dowd in the New York Office.

Section 6

Area Grants

1. Each Area receives funds (the “grant allocation”) from the Association each year to support local 501(c)3 organizations and local Area projects that your members work in. The money comes originally from the Malta Human Services Foundation and is based on the number of dues paying members by December 31 of the previous year in the Area. The Association has rules about which charities may receive grants and what the grants may be used for. The Association is strictly enforcing the requirement that a charity must have Area members actively working in the charity (not solely on a charity board) to be eligible.
2. Areas with ten or more members are required to have a Grants Committee in place to review and approve grant requests. Areas with less than ten members are not required to have a Grants Committee. It may be appropriate to have the Area Hospitaller chair the committee as the Hospitaller should be familiar with the works in which Area members are engaged. All grants are subject to review by the Executive Director and Association Grants Committee. You must provide the names of your Area Grants Committee, if you have a committee, to Tiffany Mazza-Dowd (tmazza@orderofmaltaamerican.org) at the start of each year’s Grants Program in order to receive time-sensitive communications throughout the process.
3. Please refer to the Area Grants section of the website for an accurate timeline for the current program. The program opens on or near January 15. The Area Chair is notified of the amount of the Area grant allocation. Areas must invite organizations/ local projects to apply. When the program opens, you will receive an email containing a link to the application, and a sample email invitation, which you can forward to the desired applicant to invite them to apply. Your Grants Committee should identify those charities to whom an invitation will be issued. Some Areas invite all members to submit recommendations to the Grants Committee. Others delegate that job to the Grants Committee. Some Areas invite several charities to apply, allowing the Grant Committee to approve some and not others. Other Areas only invite those charities to apply that the Grant Committee expects to approve. It’s a good idea to discuss with the charity ahead of time the amount of the grant they intend to request to assure that it is practical and reasonable. (It makes little sense for a charity to request \$100,000 when the Area only has \$10,000 available and expects to split that amount among three charities.) Applications will be approved at three different times throughout the program to allow early applicants to receive approved funds in a timely manner.
4. The American Association has two different types of grants that an Area can choose from to use to carry out the charism of the Order. Any one or combinations of these grants could be used toward your total Area Allocation.
 - a. **Local Area Project Support Grant**– To be used as seed money to begin a new project in your Area to provide greater diversity of projects for members to participate in. This one-page, online form is available on the American Association website and can only be submitted by an Area Chair. Area Grant Chairs should be aware of the application if it is submitted since it is part of the total Area Allocation.
 - b. **Regular Grants**– To be used to support organizations in which your members are actively involved in. This one-page, online form is available on the American Association website.
5. The last step in the grant process is to follow-up with each grantee to confirm that they have used the grant moneys as intended. You or your designee must visit with each grantee and file a report on that visit by December 31 of the year in which the grant is made.
 - a. If you don’t submit the follow-up forms which are required, your Area will not receive a grant allocation the following year, and a charity that does not use the funds as intended may not be eligible for further grants.

Section 7

Who to contact

Updated June 2021

There are many resources available to the Area Leadership Team to help-them become more effective leaders.

1. 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.
2. The Association web site, www.orderofmaltaamerican.org, is a rich source of information and forms. It also provides links to other helpful Areas on the web. Tiffany Mazza can help you get access to the website if you have not yet logged in.
3. **American Association Officers**
 - Kenneth R. Craig, KM– President
 - Thomas J. Reedy, KMOB.– Chancellor
 - Rev. Msgr. Robert Ritchie, GCChC – Chief Chaplain
 - Rev. Dr. Jeffrey Trexler,–Executive Director
 - Laure C. Aubuchon, DM - Treasurer
 - Rory Kelleher, KMOB. – Secretary
 - Anne G. Peach, DM – Hospitaller
4. **Key Committee Chairs**
 - Here is a list of 2021 chair-people for key Association Committees. They are always ready to help or to get you to the person who can help you.
 - **Admissions/Preparation:** Thomas Reedy, KMOB.
 - **Area Support and Development:** Virginia Dwyer-Aoyama
 - **Audit:** Michael Donoghue, KM
 - **Auxiliary:** Margaret (Meg) Lyons, DM
 - **By-Law/Legal:** Rory Kelleher, KMOB
 - **Communications:** John Mitchell, KM
 - **Disciplinary:** Thomas Egan, KM
 - **Finance/Budget Review:** Laure C. Aubuchon, DM
 - **Grants:** Anne Peach, DM
 - **Lourdes Pilgrimage:** John Mitchell, KM, Stacey Reisman, DM
 - **Nominating:** Virginia Dwyer-Aoyama, DM
 - **Spirituality, Education, Witness to the Faith:** Fra' Nicolas Tegoni
 - **American Association, Prison Ministry:** Robert Nephew, KM, Mary Jo Kriz, DM
5. **Area Support and Development Committee**
 - The Area Support and Development Committee is a committee of the Board of Directors. Its members are experienced Area leaders whose purpose is to help Area Chairs and Area Hospitallers succeed in their roles. They are available to consult on Area issues at the request of the Area chair.

Area Support and Development Committee, 2024

Name	Phone	Email
Virginia Dwyer-Aoyama, DM	203-273-2264	vdwyeraoyama@gmail.com
Thomas Egan, KM	352-895-1810	orderofmalta@nefl.pro
Joseph Dutkowsky, MD, KM	607-267-8313	jdutkowsky@yahoo.com
H. Stephen Fletcher, MD, KM	201-404-8148	Flet1641@gmail.com
Thomas Reedy, KMOb	708-227-0407	Reedytom33@gmail.com
John Mitchell	203-912-4379	jmitchell@radiusmediagroup.com
Edward Delaney, KM	617-759-2584	Ejdelaney02@gmail.com

6. 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, 14 E. 51st Street, New York, NY 10022
- The office telephone number is (212) 371-1522.
- The office fax number is (212) 486-9427.
- The general office email is staff@orderofmaltaamerican.org

Rev. Dr. Jeffrey R. Trexler, Executive Director

- Responsible for 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.
- The Executive Director of the American Association shall report to and be directly responsible to the President and shall perform such duties as the President shall direct.
- Reviews all grant applications to check for meeting Federal Regulations of required documentation following all Federal Guidelines for Non-Profit Grants.
- Working with the Controller in Budget Preparation.
- Officially designated to approve and sign all documents that are legally binding to the American Association.
- May sit on all committees of the American Association.
- Handles any special circumstances that might arise with membership financial obligations confidentially.
- E-mail: jtrexler@orderofmaltaamerican.org

Raymond J. LaRose, Assistant to the Executive Director

- Editor of the Hospitaller newsletter.
- Attends Board and various committee meetings; supports the President and the Board.
- Provides guidance/direction to office staff in absence of the Executive Director.
- Office Representative and Liaison with Capital Campaign.
- E-mail: rlarose@orderofmaltaamerican.org

Jacqueline Finnen, Controller

- In charge of all financial and accounting activity.
- Prepares audits and monthly reports for Treasurer.
- Area Bank Accounts.
- Grants Program.
- Board Meetings.
- E-mail: jfinnen@orderofmaltaamerican.org

Maria Di Giacomo, Administrative Assistant for Member 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.
- Primary telephone receptionist.
- Handles mail and translation/communications with Sovereign Magistry.
- Daily system back-up for disaster recovery.
- Coordinates Pilgrimage for Life and Association Retreats.
- E-mail: maria@orderofmaltaamerican.org

Carla Gunerard, Program Coordinator for Major Events

- Office leader for the Lourdes Pilgrimage.
- Office leader for the Investiture/annual dinner.
- Office leader for Wisconsin Pilgrimage.
- E-mail: carla@orderofmaltaamerican.org

Matthew LaRose, IT Systems Manager

- Office leader for technology issues and support (including IDs, passwords and updates).
- Prepares annual contribution billings and receipts.
- Manages website data.
- Manages A\V support for events.
- E-mail: mlarose@orderofmaltaamerican.org

Tiffany Mazza, Communications Specialist

- Maintains American Association website, mobile app, Area Grants and Admissions programs, and online courses.
- Office contact for weekly Spirituality in Action Update emails.
- Supports Area Chairs and Board Committees in communications plans, new projects, and issues.
- Implements new communications initiatives.
- E-mail: tmazza@orderofmaltaamerican.org

Miquan A. McLaurin, Accounting Assistant/Gift Processing Coordinator

- Financial and Accounting Support.
- Membership Handbook production.
- E-mail: miquan@orderofmaltaamerican.org

Section 8

Other Order of Malta Related Websites

1. American Association Website: <https://orderofmaltaamerican.org>
2. Order of Malta in Rome: <https://www.orderofmalta.int/?lang=en>
3. Other US Associations
 - a. Western Association: www.orderofmaltausawestern.org
 - b. Federal Association: <https://www.orderofmalta-federal.org>
4. Malteser International: <https://orderofmaltarelief.org>
5. Holy Family Hospital of Bethlehem Foundation: <https://birthplaceofhope.org/>
6. Auxiliary website address: <https://orderofmaltaamerican.org/american/auxiliary/>
 - a. 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.
7. The Order of Malta Pilgrimage Foundation website address:
 - a. <http://www.pilgrimagefoundation.org/>
 - b. The principal purpose of the Order of Malta Pilgrimage Foundation is to promote, fund, sponsor or coordinate programs and activities to cover the costs and expenses of Malades (sick, handicapped, wounded and otherwise deprived individuals) and their Caregivers so they can attend the annual Lourdes Pilgrimage in France or any other religious pilgrimages to locations of importance to members of the Roman Catholic Church and to the Order of Malta.

Section 9

Affiliate Members

1. A key component of the 2019 Strategic Plan focuses on revitalizing and clarifying the role of the Auxiliary in the American Association so that it may expand the work of the Association and help sustain its growth by attracting young people to the Order. The Board of Directors has defined ‘Affiliates’ of the Association as comprising three distinct groups: ‘Auxiliary’ who are ages 18 to 39 and ‘Associates’ who are age 40+. Members of both groups are afforded a unique opportunity to:
 - a. Learn about the Order of Malta with the chance to consider membership at some future date.
 - b. Engage in hands-on works aligned with the Order’s mission of serving the poor and the sick.
 - c. Receive support in their spiritual development.
 - d. Participate in the activities of the Area and the Association.
 - e. Participate in the Catholic community, providing an evangelization opportunity.
2. Auxiliary are further offered the opportunity to develop their own Area and Association wide projects in partnership with the Associations’ leadership and under the organization of their own governance structure.
3. **Affiliate Application:**
 - a. All Affiliate applicants must be sponsored by a member of the Order (i.e. a Knight, Dame, or Chaplain).
 - b. Applicants are required to complete the Affiliate application which will be provided by their sponsor (found in the Members Only section of the American Association [website](#)).
 - c. Once an applicant has completed the application, their sponsor must add their recommendation and signature and email it to the Area Chair. The Area Chair(s) will evaluate the application and advise the Executive Director as to whether the application has been accepted. If accepted**, the applicant will be sent a welcome letter by the Executive Director in the name of the Area Chair. If rejected, the Area Chair will consult with the Executive Director and chair of the Affiliates Committee to discuss the reason for the rejection and determine the most appropriate way in which to communicate the decision to the applicant and their sponsor.
 - d. ** All acceptances are contingent upon a background check and completion of Safe Environment Training
 - e. Affiliate applications are *not* the same as the standard membership application. The application is different and much shorter as we are aiming to make it easier for Affiliates to join us in our effort to care for the sick and the poor and witness the faith.
 - f. The goal for all affiliates/auxiliary members is to transition them into full membership
4. **Auxiliary and Associate Requirements:**
 - a. Auxiliary Applicants must be at least 18 years of age. Associates are 40+ years of age.
 - b. Practicing Roman Catholics
 - c. Complete the application
 - d. Complete the Safe Environment training
 - e. Pass a background check performed through the Malta office in New York.
 - f. Detailed knowledge of the Order’s rich spirituality and traditions is not essential.
 - i. Affiliates will gain this knowledge through their work and the witness of the and members with whom they engage.
 - g. All affiliates are required to certify that they have not and will not make public statements, either official (e.g., printed news) or unofficial (e.g., social media), that could be interpreted as critical of or opposed to the teaching of the Catholic Church on matters of faith or morals.

- h. Affiliates can be a member other Catholic orders, religious intuitions, and communities, but the Order of Malta must take priority.
 - i. If one is already significantly committed to another religious order within the Church, such as the third order of Franciscans, Dominicans or Trappists, Opus Dei or Regnum Christi, membership as a Knight or Dame in the Order of Malta is not possible according to Canon Law and the Orders' Code. However, membership in other organizations of knighthood such as the Order of the Holy Sepulchre or Knights of Columbus is permissible.
 - i. Affiliates are not required to pay Association level annual dues
 - i. Area Chair(s) may impose a nominal fee at the Area level. If applied, dues are not to exceed \$50.00 annually and all dues collected are to be reserved for use by the Affiliates to support their works.
 - j. Affiliates are not required to complete the Year of Formation studies.
5. **Volunteers**
- a. This is the third class of Affiliate Members.
 - b. They do not have to be a member of the Catholic Faith.
 - c. They learn about the Order of Malta
 - d. Engage in hands-on works aligned with the Order's mission of serving the poor and the sick.
6. **Volunteer Requirements**
- a. They must be at least 18 years of age.
 - b. They must complete the Application.
 - c. They must pass a background check and Safe Environment training.
 - d. All affiliates are required to certify that they have not and will not make public statements, either official (e.g., printed news) or unofficial (e.g., social media), that could be interpreted as critical of or opposed to the teaching of the Catholic Church on matters of faith or morals.
 - e. Affiliates are not required to pay Association level annual dues
 - i. Area Chair(s) may impose a nominal fee at the Area level. If applied, dues are not to exceed \$50.00 annually and all dues collected are to be reserved for use by the Affiliates to support their works.
 - f. Affiliates are encouraged to work alongside members of the Order as they fulfill their mission to care for the sick and the poor and defend the faith.
 - g.
7. **When considering an Affiliate Application**
- a. Area Chairs should evaluate an applicant on their application, the recommendation of their sponsor, and the applicant's involvement or intent to be involved in the works of the Order.
 - b. Area Chairs are not required to interview candidates but are encouraged to meet with them informally to get to know them.
 - c. It is expected that an applicant will have had some involvement working with their sponsor or other Affiliates, there is no prerequisite regarding the number of hours the applicant has worked, how many Area events they have attended, or how many hours they have contributed.
 - d. An applicant's marital status (divorced and remarried without annulment) would preclude membership since such action publicly violates Church teaching.
 - e. A pastor's recommendation, needed for an application to become a Knight or Dame, is not required; a sponsor's knowledge of the applicant is sufficient.
 - f. Submission of baptismal or marriage certificates is not required.
8. **Affiliate/Auxiliary Expectations**

- a. Affiliates are encouraged to work alongside members of the Order as they fulfill their mission to care for the sick and the poor and defend the faith.
- b. Auxiliary are encouraged to create their own works, in consultation with their Area Chair(s), that are relevant to their generation.
- c. Affiliates should be invited to all events to which members of the Order would be invited this includes liturgies, investiture, social gatherings, meetings, retreats, symposia, and works. When a fee is required to participate, event organizers are encouraged to consider offering a discount to Auxiliary.
- d. Affiliates are not members of the Order, their active participation in Area or Association wide events, although greatly encouraged, is not mandatory.
 - i. Should a situation arise wherein the Area Chair(s) is considering the revocation of an Affiliate's membership, the Area Chair should consult with the chair of the Affiliate Committee and Executive Director to discuss the situation and determine the best way forward.
- e. The Board of Councillors has authorized the Auxiliary to have its own governance structure. This Auxiliary Board is comprised of a Chair, Vice-Chair, Hospitaller, Treasurer, and Secretary and is mentored by the BOC Affiliates Committee
- f. Auxiliary groups can raise their own funds as long as the standard rules and procedures of the Order of Malta are followed. Quarterly financial reports must be submitted to the American Association Controller on the same schedule and in the same detail as an Area report.
- g. Auxiliary should work with their Area Chairs to identify an Association Chaplain who can minister to their spiritual needs. If an Association chaplain is not available within the Area, the Auxiliary and Area Chairs should work together to identify a chaplain using the standard procedures and policies for appointing chaplains.
- h. Affiliates are strongly encouraged participate in the Lourdes pilgrimage as this is a unique opportunity to experience the Orders' charism at its fullest and best.
- i. Associate members are not able to have their own governance structure at the Area level and must follow the leadership of the Area Chairs.

Section 10 Guidelines for Sale of Merchandise

1. Merchandise General Guidelines

- a. Over the past several years, some groups have sold Order of Malta related merchandise as a means of raising funds to support Area, Association and Order of Malta activities. These guidelines have been established to govern the sale of merchandise at the Area and the Association level and continue in effect until rescinded.
- b. Merchandise must be related to the Order of Malta (i.e., incorporate a recognized symbol of the Order or a religious theme).
- c. Merchandise may only be sold in support of each Area's charitable activities or to support the activities of the Area Auxiliary or the activities of the Association or the Order of Malta.
- d. 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.
 - i. 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:
 - ii. Identification of the Charity or project that will benefit from sales or a summary of how the Auxiliary group will use the funds.
 - iii. Description of merchandise to be sold, accompanied by a sketch or photo of the product.
 - iv. Financial summary detailing cost of product, sale price, and expected proceeds.
 - v. Summary of the means by which the sales will be facilitated (e.g. direct mail, internet, table at Area events) NB: The organizers of any events must grant their approval for sales to be conducted at an event.
 - vi. Identification of the individual(s) that will manage all finances associated with purchasing of the products and sales along with a description of how payments will be accepted.
 - vii. A report summarizing all sales activity and financials must be submitted to the Area Chair and the Executive Director at least annually. A report must be submitted in any quarter where sales revenue exceeds \$5,000.

2. Lourdes Merchandise Sales Guidelines

- a. As those of you who have participated in past Lourdes Pilgrimages are aware, some Areas within the Association have offered merchandise for sale during the evening receptions as a means of raising funds to support the Area's charitable endeavors. It is expected that sales revenues will increase over the years.
 - b. The general guidelines governing the sale of merchandise apply with the following Lourdes specific additions:
3. The sale of all merchandise will be managed and accounted for by the Area/Auxiliary participating.
- a. The 'Merchandise Shop' will be open each evening during the reception preceding dinner at a designated location identified by the Advance team.
 - b. The sale of merchandise at other times or in other locations in the hotel (e.g. in the dining room) is prohibited.
 - c. Space made available in other hotels will be coordinated by the Executive Director in conjunction with the Areas participating.
 - d. 50% of the net proceeds from sales will be donated to support the Pilgrimage (e.g., sponsoring a Malade, making a contribution to the Pilgrimage Foundation, etc.); the remaining 50% will be retained by the Auxiliary/Area to support their activities.

- e. Any Area/Auxiliary wishing to sell merchandise in Lourdes must obtain the approval of the Executive Director by February 1 of the Pilgrimage year.

4. Rome Regulations regarding Merchandise

- a. As of 2021, Rome has set forth a policy that all merchandise bearing any logo or name must have the merchandise registered with a picture of the item, the name and address of the manufacturer, the actual cost to have the merchandise produced and the selling price.
- b. In addition, the organization selling the item must provide a quarterly report of how many pieces of the particular merchandise were sold to date and well as the number of remaining inventories.
- c. This information must be sent to the New York Office, to the attention of Carla Gunerard, who then enters this information into Rome's Merchandise Data Entry System.

1. Upon notification of death by family to the Executive Office

- a. The Executive Office will notify the Area Chair of the member's death.
- b. The Area Chair is then responsible for notifying his/her members.
- c. The Executive Office will update the records in the Associations data base.
- d. The Executive Office will notify all members of the members passing.

2. Upon notification of death to the Area Chair

- a. The Area Chair should notify the members of his/her Area.
- b. The Area Chair should notify the Executive Office so that staff may update the member's records.

3. Funeral Pall

- a. 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 or some designated person, 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. Because of the limit palls available, it is suggested that the Areas purchase their own funeral pall. This avoids the possibility of a funeral pal not being available in the event that more than one Area has a funeral scheduled at the same date. The cost is \$425. Please contact Carla Guneward in the Executive Office if your Area wishes to purchase one for your Area.

4. Suggested Protocol for the wake of a Member

- a. 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 priest 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. Example available in [Appendix 11](#)

5. Robes at Wakes

- a. If several 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 designated Knight or Dame, after conversations with knowledgeable local members and the family. If it is decided and approved that members will attend a wake in their robes/capes 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 changing facility that will be available for the members.

Appendix/Reference Documents:

1. [Appendix 1](#) – Area Chair Timeline
2. [Appendix 2](#) – Expectations, Duties, and Obligations of the Members of the Third Class
3. [Appendix 3](#) – Sample Invitation Letter for a Meeting with Prospective Members
4. [Appendix 4](#) – Organization of an Information Meeting with Prospective Members
5. [Appendix 5](#) – Sample Membership Application
6. [Appendix 6](#) – Description of the Year of Formation
7. [Appendix 7](#) – Spirituality in Action Update Form
8. [Appendix 8](#) – Accounting forms
 - a. Schedule of Cash Disbursements
 - b. Schedule of Cash Receipts
 - c. Bank Reconciliation Form
 - d. Sample Letter for Event – Cost of Goods and Services Received
 - e. Sample Letter – Contribution – No Goods and Services Received
 - f. Policy for Area Donations (Solicited or Unsolicited)
 - g. Acknowledgement of Area Donation Receipt (greater than 5k)
 - h. Area Donations Follow-up Information Form (greater than 5k donation)
 - i. Area Donation – Short Form greater than 5k
 - j. Area Donation – Short Form Less than 5k
9. [Appendix 9](#) – Area Grants
10. [Appendix 10](#) – Organization of a Day of Recollection
11. [Appendix 11](#) – Setup for Member Funeral

Appendix 1 – Area Chair Timeline

- January 1 – Let the NY Office know the names of your Grant Committee.
- January 2 – Begin planning Lenten Day of Recollection.
- January 8 – Notice from NY on unpaid annual contributions – send reminder to those who haven't paid.
- January 10 – Submit quarterly financial report for prior year Q4.
- January 15 – Grant applications become available (on or near the 15th to be determined and announced by NY Office).
- January 31 – Area notified of grant allocation (may actually occur later), this information is helpful for use in advising grant applicants of amount they could reasonably request.
- February 11 – Area Mass for World Day of the Sick.
- February 20 – Receive Area support payment (full amount for members who made their annual contributions by January 31).
- March – Early March but variable, Area chairs are asked if they want to be on the ballot for the Area Chair Advisory Committee (to advise on candidates for the Board of Councillors).
- March 15 – Deadline for regular grant submissions from organizations (on or near the 15th to be determined and announced by the NY Office).
- April 1 – Deadline for submission of Part 2 of admissions application and Year of Formation online course for current year candidates.
- April 15 – Submit Q1 quarterly financial report.
- April 30 – Current year applicants' passage fee balance due.
- April 30 – Admissions applications opens for next year's candidates.
- April 30 – Deadline for Area grants committee and Area Chair to approve grant applications and submit them to the NY Office.
- April 30 – Deadline for Emergency Food and New Area Project grants to be submitted – no grant applications will be accepted after this date.
- June – mid June, but variable, Area Leadership Conference (usually in New York).
- June 15 – Area Grant checks with Grant Acknowledgment Disclaimer form are prepared and mailed to grantees.
- June 15 – Begin preparation of following year Area calendar.
- June 24 – Area Mass for St. John the Baptist.
- July 15 – Submit Q2 quarterly financial report.
- July 15 – Receive second Area Support payment (discounted amount for members who made their annual contributions between February 1 and May 31).
- September 1 – Begin planning Advent Day of Recollection.
- September 15 – Submit calendar for following year for addition to Area website and communicate to members.
- October 15 – Submit Q3 quarterly financial report.
- November 1 – Deadline for submission of Part 1 of admissions application, certificates, passage fee deposit due for next year's candidates, and for accepting new candidates in general.
- November – Area Leadership Conference (Thursday of Investiture weekend).
 - November – Variable date, Area Mass for World Day of the Poor.
- December 31 – Grant follow-up forms due for all grants.

Legend – Items in red are required submission dates for Area Chairs.

Appendix 2 – Expectations, Duties and Obligations of Members of the Third Class, as taken from the Regulations and Commentary

1. The Third Class consists of those Members who do not make religious vows or the Promise but who live according to the norms of the Church and are prepared to commit themselves to the Order and the Church.
 - a. Duties – In accordance with the Constitution, Members of the Third Class will conduct themselves so as to give Christian example in their private and public lives, thus putting into effect the tradition of the Order. It is incumbent to them to collaborate effectively in its hospitaller and social works.
2. **Membership in the Order**
 - a. The Rules of the Order underline that all its Members, whatever their canonical status is, belong to this unique “family”, and are invited to live its charism, tuitio fidei and obsequium pauperum.
 - b. Those who request or are invited to enter the Order, in one of the categories of the Third Class, must be aware that although they do not become religious – strictly speaking – like the Professed Knights, and are not bound by a special religious Promise (like the Members in Obedience), yet they become Members, in a different way, of a religious order. This real participation of all Members in a religious order has to be in reference to the teaching of the Second Vatican Council about the call to “the fullness of the Christian life and to the perfection of charity” common to all the baptized “of every condition and rank”. Consequently, every Member, “by virtue of his Christian vocation and the special charism of the Order of Malta, is called to witness to the Faith and to Charity, to know and observe special duties and the rule of Spirituality, in order to glorify God, to sanctify himself and to build up the kingdom of God in the world”. There is no “spirituality” specific to Members of the Third Class distinguishing them from the other two Classes, but only differences in the ways of living this unique call to baptismal sanctity. The Members of the Third Class are often involved in a demanding professional life, in family duties with all that these imply, and are also expected to take part in the local activities of the church.
3. **Witnessing through an exemplary life**
 - a. The Members of the Order are to conduct their lives in an exemplary manner in conformity with the teachings and precepts of the Church. The Constitutional Charter acknowledges fully the teachings of the Constitution Lumen Gentium of the Second Vatican Council on the role of the secular faithful in the Church. A teaching elaborated again in the Decree Apostolicam Actuositatem, and further expounded by Pope John-Paul II in his Post Synodal Exhortation Christifideles Laici. The first call Members of the Order should hear, is the one addressed to all faithful, to “exercise the apostolate... by their activity directed to [...] the penetrating and perfecting of the temporal order through the spirit of the Gospel. In this way, their temporal activity openly bears witness to Christ”. Even before any specific involvement in the Order’s charitable work, the commitment of its Members’ must be exercised in the first place in “the ordinary conditions of life... Neither family concerns nor other secular affairs should be irrelevant to their spiritual life”. The same Council text underlines the fundamental human virtues: “They should also hold in high esteem professional skill, family and civic spirit, and the virtues relating to social customs, namely, honesty, justice, sincerity, kindness, and courage, without which no true Christian life can exist”. The Council further underlines that moved by the spirit of divine charity, the faithful will “really [...] express the spirit of the beatitudes in their lives”, words which those who bear the eight-pointed cross cannot but fully appreciate.
4. **Life of prayer and Christian Formation**

- a. Among the practical directives given for the Members of the Third Class very important are those concerning the life of prayer and Christian formation. Many of them are relevant to every baptized. The [Synod of the Bishops](#) (2019), dedicated to the Word of God, strongly recommends to everybody the reading of Holy Scriptures. Prayer has to be complemented by Christian formation. Many texts of the Second Vatican Council “earnestly exhort laymen – each according to his own gifts of intelligence and learning – to be more diligent in doing what they can to explain, defend, and properly apply Christian principles to the problems of our era in accordance with the mind of the Church”, terms in which one would have no trouble recognizing the *tuitio fidei* dear to the Order. The protection and witness of the faith concerns all Members of the Order of Malta. Members often find themselves in a situation of facing doctrinal deviations, especially in the ethical field.

5. Participating concretely in the works of the order

- a. “To devote oneself to the charitable activities of the Order” is an essential part of the Members’ duties. Of course, and the texts speak in this sense, the participation in the works of the Order must take into account family or professional duties; the priority being with these obligations. The generosity of the Members of the Order should manifest itself, preferably, in the charitable activities of the Order itself. Such participation will be all the more effective, if the Members take the trouble to acquire the necessary qualifications. Of course, the fullness of participation is achieved when one has direct contact with our Lords the sick or the poor. When doing so, it is Christ Himself Whom we recognize and worship in them.

Appendix 3 – Sample Invitation and Letter for Meeting with Prospective Members



The XYZ Area of
Sovereign Military Hospitaller Order of
Saint John of Jerusalem of Rhodes and of Malta
American Association, U.S.A.

Cordially invites you to an Informa-
tional Meeting and Reception on
Saturday, June x, 202x
5:30 P.M.
at
The ZYX Country Club
357 Elm Street, Anywhere, USA

R.S.V.P. by June 1, 202x – (555) 555-1212

Sample letter template to send with invitation to prospective members - adjust as appropriate depending on the specific circumstances.

September x, 202x

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

Dear Mary and John,

The Order of Malta is a religious lay Order of the Catholic Church founded in 1099 A.D. in Jerusalem during the Crusades. Its charism is personal sanctification through witness to and defense of the Roman Catholic Apostolic faith and service to the sick and the poor. The Order has a worldwide 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 3,500 members. The American Association, the largest of the three associations, has approximately 1800 members throughout the United States.

Participation in charitable activities of the American Association includes support for organizations in the United States and in the Caribbean and Central America. Some of the projects where members participate include assisting in 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, and service at homeless shelters and soup kitchens.

The combination of all the good works and spiritual outpourings of the Order are epitomized by an annual pilgrimage to Lourdes. The Association joins with Knights and Dames from all over the world, 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 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, and education in the faith are also made available throughout the year. The Association also has a pilgrimage each year to the Shrine of Our Lady of Good Help in Champion, Wisconsin.

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.

We would like to invite you to attend a reception at the Hometown Club in Springfield 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 activities 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 consider membership in the Order. We are enclosing a small pamphlet that describes the Order and its activities to give you an opportunity to know about the Order prior to the reception on April 2.

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

Joe Smith	123-	mmm@aol.com
Pete Jones	234-	nnn@ya-
Roberta	345-	ppp@op-

Yours in Christ,

Appendix 4 – Preparing a Reception for New and Potential Members

1. Some tips for hosting a reception for potential members:

- a. Host a reception cocktail party at a country club; if appropriate, the home of a Knight or Dame could be considered.
- b. 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.
- c. Keep the Area Chaplain involved in the planning and in the reception itself.
- d. Ask each Area member to identify one or two candidates who should be invited to the session; the member should plan to attend with the candidate.
- e. Post the meeting on the Area calendar as soon as it is set.
- f. Send formal invitations by mail or electronically.
- g. Follow ups: e-mails, calls, letters, texts, etc.

2. Program Agenda:

- a. Short introductory period/name tags/informal introductions
- b. Reception
- c. Introduction by Area Chair
- d. History of the Order by Knight or Dame or invited guest
- e. Review of Lourdes Pilgrimage by Area Chair or Lourdes Pilgrim
- f. Review of Area projects and activities by Area Hospitaller or active members
- g. Remarks by Ordinary/Chaplain
- h. Brief outline of admissions process by Area Chair
- i. Q/A session
- j. Reception continues

3. Some suggestions:

- a. Have a DVD monitor set up on a table showing the one of the Association DVD or use streaming capabilities options such as, Vimeo or YouTube private channels. Video can also be shared via USB or GoogleDrive.
- b. Have a computer with internet access set up with the Association web site displayed.
- c. Have Association and Area materials available (newsletter, pamphlets, calendar, etc.).

Appendix 5 – Sample Membership 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. The minimum age for any candidates will be 25 years on date of Investiture.
2. **The Area Chair for the Area in which the candidate resides or works must endorse the application by reviewing and signing off on the entire application and sponsor recommendations. Part 1 of the application, including certificates (baptismal, marriage, annulment, RCIA) and Passage Fee deposit, is due in the Office of the American Association in New York by November 1 of the year prior to the year of expected approval and Investiture.** Please note that the 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, 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 would be accepted. If divorced, the candidate must submit a Statement of Marital Status. We will also need a Certificate of Completion of a Safe Environment Program (either through taking the course on the internet through the Archdiocese of New York – further information on how to take that program on line will follow, or if you have completed a Safe Environment Program through your local diocese).
3. The candidate must request a recommendation letter from his/her pastor in Part 1 of the application. The online and offline versions of this recommendation form include instructions for the pastor. The pastor's letter should be addressed to the Assistant Principal Chaplain at the Office of the American Association and should attest to the fact that the candidate 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 obtaining of a letter of recommendation from the bishop of the candidate's diocese regarding the candidate's life and conduct. The Bishop's approval letter is required by the Order of Malta in order to process the application.
4. If a member desires to propose a candidate for membership who does not reside within an established Area of the American Association, the requirements in #2 (above) should be forwarded to the Executive Director at the New York Office of the American Association.
5. 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 Formation Year. It is recommended that the candidate should participate in the American Association Pilgrimage to Lourdes during the Formation Year. Should this not be possible, the obligation to participate in this pilgrimage should be completed within 3 years following admission.
6. It will be the responsibility of the sponsor to insure that the candidate becomes acquainted with the history of the Order and the commitment of participating in its works and programs, as well as the

financial obligations asked of all Knights and Dames. **The sponsor will be required to certify to the completeness of the formation effort together with the Area Chair by April 1 of the year of Approval and Investiture.**

Sample Application from 2022 Admission: Please note that the entire Admissions Application process must be completed online. No physical or handwritten paperwork will be accepted.

Investiture 2022: Fees and Costs

Decorations:

Decorations will be provided at no cost to the new members, as a gift from the American Association.

All candidates must purchase a Robe (men) or Cape (women) for use in liturgical functions. The cost is approximately \$585. Ordering information will be provided from the New York Office.

Passage Fee: Age based on January 1 of the Year of Investiture

The Passage Fee Contribution is sent to the Grand Magistry in Rome to support the work of the Order.

Age 40 and Older: 2,500 USD. Passage Fee Contribution can be made according to one of the following:

- A one-time payment by April 30, 2022.
- Installment payments during the Year of Formation with final payment due by April 30, 2022.
- Other Payment Options may be available. Call or email the New York Office staff@orderofmaltaamerican.org and ask to speak to the Accounting Department to discuss.

Ages 35 to 39: 2,500 USD. Passage Fee Contribution can be made according to one of the following:

- A one-time payment by April 30, 2022.
- Installment payments during the Year of Formation with final payment due by April 30, 2022.
- 50% of Passage Fee Contribution (1,250 USD) due on April 30, 2022, and the remaining balance (\$1,250) paid in installments over the next five years.
- Other Payment Options may be available. Call the New York Office and ask to speak to the Accounting Department to discuss.

Ages 25 to 34: 1,250 USD. Passage Fee Contribution can be made according to one of the following:

- A one-time payment by April 30, 2022
- Installment payments during the Year of Formation with final payment due by April 30, 2022
- Other Payment Options may be available. Please call or email the New York Office and ask to speak to the Accounting Department to discuss.

Annual Contribution: Age based on January 1 following the Investiture (January 1, 2023).

Annual Contribution for new members will be billed in January 2023 and can be made according to

one of the following:

- **A one-time payment or**
- **Paid in installments with final payment due by October 31, 2023**

s

Annual Contribution is due by January 31 thereafter.

Ages 40 and Older: \$1,750 per year

Ages Under 40: \$875 per year

Investiture Weekend: The cost of the Investiture White Tie Dinner in New York City is approximately \$400 per person.

Lourdes Pilgrimage: Approximately \$3,750 to attend.

Our Lady of Good Hope Pilgrimage, Wisconsin: Approximately \$450 plus travel and hotel room.

Pilgrimage for Life, Washington D.C.: Approximately \$350 plus travel and hotel room.

3 Day Association Retreats (offered twice yearly): Approximately \$500 plus travel.

For any questions about payments or to pay by credit card, please contact the New York office at 212-371-1522 or email staff@orderofmaltaamerican.org.

In accordance with Association policy and insurance requirements, all candidates for membership are required to authorize a background check and to complete the Safe Environment Program. Once the application has been received (see #2 above), you will receive an e-mail with instructions on how to link to the Archdiocese site to complete information and take the Safe Environment Training. If you have already completed the training, please send a copy of your certificate.

If any person fails to complete the background check or to satisfy the Safe Environment Program requirements, his or her application will not be reviewed by the Admission Committee.

GENERAL

1. In order to begin the application process, the primary sponsor must submit a Pre-Screen Questionnaire about the potential candidate. Once this questionnaire has been reviewed and approved by the NY Office, the candidate will receive an email with instructions on how to begin the online 2021 Admissions Application process.
2. If all of the documents are submitted in a timely manner and all required contributions and fees paid, the Admissions/Formation 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 Magistracy 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 Magistracy and the candidate will be so advised. Final approval by the Grand Magistracy is required for admission to the Order.
3. If any circumstances occur that are not clearly outlined within these instructions, the sponsor or the Area Chair should communicate with the Executive Director of the American Association.

SUMMARY OF SUBMISSION DATES

2022 Admissions Process Timeline	
Tasks	Date
2022 Admissions Application Opens	4/30/2021
First part of application due including all certificates (Baptismal, RCIA, Marriage, Annulment, Divorce)	11/1/2021
Deadline for accepting new applications for 2022 Investiture*	11/1/2021
NY Office sends Passage Fee invoices to candidates	3/1/2022
Second part of application due	4/1/2022
Year of Formation online course to be completed by candidates	4/1/2022
Passage Fee balance due	4/30/2022

***Passage Fee Deposit due upon submission of first part of application**

***Sponsor Recommendations and Area Chair Approvals due within 2 weeks of receiving email notification from program**

OUTLINE OF 2022 ADMISSIONS APPLICATION PROCESS

1. Pre-Screen Questionnaire
2. First Portion of Application
 - a. Introductory Information (contact information, sponsors, marital status, work, church information)
 - b. Section 2: RCIA, made public statements, if they are a member of other organizations, why they want to become a member
 - c. Section 3: sign off if they will conduct their life in an exemplary manner
 - d. Candidate Resume
 - e. Acknowledgment of Fees and Costs
 - f. Pastor Recommendation
 - g. Background Check
 - h. Certificates (Baptismal, RCIA, Marriage, Annulment)
3. Second Portion of Application
 - a. Candidate Service in Year of Formation Essay
 - b. Worksheet of Activities
 - c. Pledge to Grand Master
4. Sponsor Recommendations
5. Area Chair Approval
6. Complete

SAMPLE 2022 ADMISSIONS APPLICATION PROCESS

A video tutorial of the entire 2022 Admissions Application Process is available in the Members Only section of the American Association website. After logging in as a member, click on the "Membership" button on the right-side menu and select "2022 Admissions Application". This page includes a variety of helpful information including the video tutorial, instructions for sponsors and candidates, and more. If you require additional assistance, please contact the NY Office.

Appendix 6 – Description of Year of Formation

New Members – Year of Formation

Article 109 of the Code of the Order of Malta has the following to say on the Year of Formation:

Formation 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.

Membership in the Order of Malta is a serious step and requires careful consideration and significant work to complete the requirements for admission. It requires a serious intention of lifetime commitment to the Order's 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 the Order's history, spirituality and Hospitaller work. They complete an 8-module online video course and become familiar with the Order's foundational documents, also available online. They attend Area and Association spiritual and educational events, volunteer in Area and Association projects and activities and are invited to participate in the Lourdes and Wisconsin Pilgrimages 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 Formation. A one-day seminar sponsored by the Area can provide a quality-controlled way to ensure that the candidates receive an in-depth view of the Order, the Association and the meaning of membership. See the sample agenda for a Year of Formation seminar below.

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 formation.

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

Agenda

<u>Possible topic</u>	<u>Possible presenter</u>
• Introduction	Area Chair
• Prayer	Area Chaplain
• History of the Order	Knowledgeable member
• Spirituality of the Order	Area Chaplain
• Formation and Application Process	Area Membership Chair
• Association Retreats	Area Hospitaller
• Hospitaller Tradition	Area Hospitaller
• Order of Malta Works	Active participants
○ Malteser International activities	
○ Prison Ministry	
○ Holy Family Hospital of Bethlehem	
• Area Hospitaller Works (Local Ministries)	Active Participants
○ Food Pantry	
○ Malta Walks	
○ Elementary School Weekend Food Backpacks	
○ Victims of Human Trafficking Backpacks	
○ Homeless Shelter Kitchen	
○ Etc.	
• Witness to and Defense of the Faith	Active Participants
○ Malta Forum	
○ March for Life	
○ Rosary at Planned Parenthood	
○ Defense of the Faith Symposium	
• Other Area Spiritual Activities	Chaplain
○ Days of Recollection	
○ Mini-Retreat	
○ Monthly Mass	
• Lourdes Pilgrimage	Lourdes Pilgrim
• Mass	Bishop/Area Chaplain

Appendix 7 – Spirituality in Action Resource Book Input Form

Sample only, must be submitted online [here](#)

Order of Malta, American Association Project Information

Project Name: _____ Order of Malta Area _____

Project Address: _____

Project Start Date: _____

Description of Work, Services provided, and the people it serves (thoughtful and concise):

Describe the kinds of activities that members are involved in and the time commitment normally required:

Category (check the all functions relevant to this project):

___ Prison Ministry

___ Housing/ Homeless

___ Pregnancy Support

___ Elder Care

___ Physically/mentally disabled

___ Food

___ Medical/Dental

___ Eucharistic Ministry

Other: _____

Estimated number of SMOM Knights, Dames and Auxiliary involved in the project annually: _____

Estimated annual hours of service by Knights, Dames and Auxiliary
(in aggregate): _____

Is this a flagship project in your Area? (Y/N) _____

Project Order Relationship (select one):

Run by the Order _____

Supported by the Order _____

Provide Volunteer Services only _____

Organization Responsible for Project (Catholic Charities, etc): _____

Project's Major Funding Source: _____

If project is outside the US (Haiti, Guatemala, etc), please provide:

Country of Project Location: _____ Continent of Project Location: _____

Country of organization responsible (Project Owner): _____

Annual SMOM Financial Contributions

American Association Grants: _____

Area Grants: _____

Area Contributions: _____

Please provide high quality digital photos where appropriate.

American Association Contact

Name: _____ Area: _____

Phone: _____ Email: _____

Name and contact information for person completing the form if different from above:

Name: _____ Email: _____

Phone: _____

PLEASE TYPE OR WRITE/PRINT LEGIBLY

**Please contact Emma Smith if you have questions: esmith@orderofmaltaamerican.org
For additional questions, please contact Hospitaller, Kenneth R Craig
kenraig.smoma@hotmail.com**

Appendix 8 – Accounting Forms

- a. Schedule of Cash Disbursements
- b. Schedule of Cash Receipts
- c. Bank Reconciliation Form
- d. Sample Letter for Event – Cost of Goods and Services Received
- e. Sample Letter – Contribution – No Goods and Services Received
- f. Policy for Area Donations (Solicited or Unsolicited)
- g. Acknowledgement of Area Donation Receipt (greater than 5k)
- h. Area Donations Follow-up Information Form (greater than 5k donation)
- i. American Association Grant Request Form
- j. Area Donations – Short Form less than 5k

c. Bank Reconciliation Form

Order of Malta – American Association Bank Reconciliation Form

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)

Outstanding Items:

Deposits:

- 1.
- 2.
- 3.

Checks:

- 1.
- 2.
- 3.

Bank Balance _____
(date) Support-

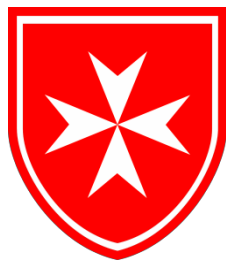
ing documents to be attached:

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.

Prepared by _____ Date _____

Approved by _____ Date _____

d. Sample Letter for Event – Cost of Goods and Services Received



Letter for Event – Cost of Goods and Services Received

Date

Name
Address
City, State, Zip

Dear: _____

On DATE, we received your check number_____, 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, USA”. Please consult your tax advisor with any additional questions.

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 the Area Chairman or Treasurer
Order of Malta, American Association
Name of Area

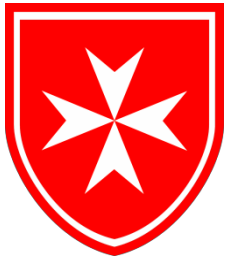
**Sovereign Military Hospitaller Order of Saint John of Jerusalem of Rhodes and of Malta
American Association**

**St. Patrick’s Cathedral Parish House
14 E 51st Street - New York, NY 10022**

Telephone: (212) 371-1522 – Fax: (212) 486-9427

staff@orderofmaltaamerican.org – www.orderofmaltaamerican.org

e. Sample Letter- Contribution– No Goods and Services Received



Letter Contribution – No Goods and Services Received Date

Name
Address
City, State, Zip

Dear: _____

On DATE, we received your check number_____, in the amount of \$xxxx, which represents a contribution to our organization. The amount of your gift 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, USA”. Please consult your tax advisor with any additional questions.

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 the Area Chairman or Treasurer
Order of Malta, American Association
Name of Area

**Sovereign Military Hospitaller Order of Saint John of Jerusalem of Rhodes
and of Malta American Association
St. Patrick’s Cathedral Parish House
14 E 51st Street - New York, NY 10022
Telephone: (212) 371-1522 – Fax: (212) 486-9427
staff@orderofmaltaamerican.org – www.orderofmaltaamerican.org**

f. Policy for Area Donations (Solicited or Unsolicited)

Order of Malta – American Association Policy for AREA DONATIONS (SOLICITED or UNSOLICITED)

Purpose

Occasionally an Area might decide to make a donation to a charitable organization in the event of a need. This could be either solicited or unsolicited, and outside of the normal window of Association Grants. Many of our Areas have their own reserves to carry out this generous act.

The following guidelines will help you determine which form you should use in order that we comply with the IRS regulations for Non-Profit Organizations.

Which Form to Use

Less than \$5,000 – Please use Short Form 8/6/20

\$5,000 or more – Please use the regular Association Grant Application and Receipt

When to Submit the Forms

Please submit your forms with your Quarterly Financial Reports to the New York Office to the attention of Jacqueline Finnen, Controller.

When to do a Follow Up Form

If the Area donation is less than \$5,000–

- **No follow up form is necessary.**

If the Area donation is \$5,000 or more –

- **Please fill out and sign a grant follow up form at the end of the calendar year, just as you would with any regular grant.**
- **This form should be attached to your Fourth Quarter Financial Reports.**

8/6/20

g. Acknowledgement of Area Donation Receipt (\$5,000 or greater)

**ORDER OF MALTA – AMERICAN ASSOCIATION
ACKNOWLEDGEMENT OF AREA DONATION RECEIPT
(\$5,000 or Greater)**

Donation of _____ Area

Name of Organization:

Check No.

Receipt of the foregoing contribution of \$xxxx is hereby acknowledged and it is agreed that it will be used exclusively as per your request.

Please indicate whether or not any goods or services were provided to the Order of Malta, American Association in consideration for this contribution (such as food, beverages, entertainment received at fundraising events).

YES NO

If yes, please describe what was provided to the Order of Malta, American Association and give a good-faith estimate of the value of the goods or services provided:

Description _____	Est. Value\$ _____
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CONTRIBUTIONS ARE MADE AT THE DISCRETION OF THE ORDER OF MALTA, AMERICAN ASSOCIATION.

By accepting this grant, you acknowledge that the Order of Malta, American Association has no responsibility for the governance or the management of your organization.

This grant, and any volunteer services or individual gifts contributed by members of the American Association, do not constitute sponsorship of your organization by the Order or the American Association or create anything other than a donor/donee relationship. Responsibility for the oversight and operation of your organization rests solely with your leadership and not the Order of Malta, the American Association or any of its members. The grant provided herein and any volunteer services performed by our members are solely intended as a gift to further the worthy endeavors of your organization. Although your organization may be described as a "Malta Project" or "Malta Ministry," those descriptions are intended only to help Association members identify charitable organizations suitable for support as part of their part of our mission and their obligations as members of the Order of Malta.

If your organization deals with children, as a condition for accepting this grant, you certify that background checks have been completed on all participants including employees and volunteers and that appropriate training of such participants has been conducted.

Name of Senior Officer of the Organization (please print or type)

Signature of Senior Officer

Date

Title

PLEASE RETURN TO: JACQUELINE FINNEN, CONTROLLER
ORDER OF MALTA, AMERICAN ASSOCIATION
1011 FIRST AVENUE - SUITE 1350
NEW YORK, NY 10022

Revised 8/6/20

h. Area Donation Follow-Up Information Form – Donations of \$5,000 or More

ORDER OF MALTA – AMERICAN ASSOCIATION
AREA DONATION FOLLOW-UP INFORMATION FORM (ONLY FOR DONATIONS \$5,000 OR GREATER)
(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:

Name: _____

Street: _____

City: _____ State: _____ Zip Code: _____

Tel: _____ Fax: _____ Email: _____

Amount of Donation Approved: _____

Purpose of Donation: _____

Contact Person: _____

Date of Follow-up Visit to Organization _____

1. Did the organization spend the money which they received for the donation?
 - a. Yes No
 - i. If no, when do they expect to spend the money?
 - ii. 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 donation'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 donation request in the future, do you believe the American Association should consider future contributions to this organization?
7. Any other comments and/or observations:

Name of Interviewer _____

PLEASE PRINT

Title _____

Area Chairs and Treasurers: Please return this form when you turn in your Q4 Financial Reports to Jacqueline Finnen, Controller.

i. Area Donation Application Form – Donations of \$5,000 or More

AREA DONATION APPLICATION FOR \$5,000 OR GREATER

(Please Print or Type. Do not staple materials – Clip only)

* NAME AND ADDRESS OF TAX-EXEMPT ORGANIZATION SUBMITTING APPLICATION:

Name: _____

Street: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ Fax Number: _____

IRS EIN # _____ E-Mail: _____
(Required Information)

Amount Requested: \$ _____ For Fiscal Year: _____

Total Project Cost: \$ _____ Amount Requested: \$ _____

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: _____

Email: _____

Name of Executive Director: _____

Phone Number: _____ Fax Number: _____

Email: _____

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

YES

NO

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
 - a. 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.
 - b. When will this project be self-supporting?
6. **EVALUATION** – Explain how you will determine that you have accomplished what you want to do.
7. **DISCLAIMER** – By applying for this grant, you acknowledge that the Order of Malta, American Association has no responsibility for the governance or the management of your organization.
 - a. This grant, and any volunteer services or individual gifts contributed by members of the American Association, do not

constitute sponsorship of your organization by the Order or the American Association or create anything other than a donor/donee relationship. Responsibility for the oversight and operation of your organization rests solely with your leadership and not the Order of Malta, the American Association or any of its members. The grant provided herein and any volunteer services performed by our members are solely intended as a gift to further the worthy endeavors of your organization. Although your organization may be described as a "Malta Project" or "Malta Ministry," those descriptions are intended only to help Association members identify charitable organizations suitable for support as part of their as part of our mission and their obligations as members of the Order of Malta.

- b. If your organization deals with children, as a condition for applying for this grant, you certify that background checks have been completed on all participants including employees and volunteers and that appropriate training of such participants has been conducted.

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

NAME: _____
(Please Print or Type) (Senior Officer of Organization Only)

TITLE: _____

SIGNATURE: _____

DATE: _____

Please print or type the name and address of the person to whom the check should be directed if this grant request is approved.

NAME OF RECEIVER OF DONATION CHECK: _____ **TITLE:** _____

ADDRESS: _____

PHONE NUMBER: _____ **EMAIL ADDRESS:** _____

Area Donation Application (\$5,000 or Greater)

Revised 8/6/20

i. Area Donation – Short Form Less than 5k

**ORDER OF MALTA – AMERICAN ASSOCIATION
AREA DONATION
SHORT FORM 8/6/20 – LESS THAN \$5,000**

Name of Charitable Organization: _____

Address: _____

Phone Number: _____ Fed ID# _____

Method of distribution:

Check: ___ Ck# _____ (copy of check attached) Gift Cards ___ # of cards _____

Total \$ amount _____ (Please note if over \$5,000 use the Association Grant Application)

Receipt of the foregoing contribution is hereby acknowledged and it is agreed that it will be used exclusively to further the work of your organization.

Purpose of the Contribution:

CONTRIBUTIONS ARE MADE AT THE DISCRETION OF THE ORDER OF MALTA, AMERICAN ASSOCIATION.

By accepting this contribution, you acknowledge that the Order of Malta, American Association has no responsibility for the governance or the management of your organization.

This contribution and any volunteer services or individual gifts contributed by members of the American Association, do not constitute sponsorship of your organization by the Order or the American Association or create anything other than a donor/donee relationship. Responsibility for the oversight and operation of your organization rests solely with your leadership and not the Order of Malta, the American Association or any of its members. The contribution provided herein and any volunteer services performed by our members are solely intended as a gift to further the worthy endeavors of your organization.

If your organization deals with children, as a condition for accepting this grant, you certify that background checks have been completed on all participants including employees and volunteers and that appropriate training of such participants has been conducted.

Name of Senior Officer of the Organization (please print or type)

Signature of Senior Officer

Date

Title

Signature of Area Chair

Date

Form must be attached to Area Bank Reports
Short Form 8/6/20

Appendix 9 – Area Grants

SAMPLE 2022 AREA GRANTS PROGRAM

A video tutorial of the entire 2021 Area Grants Program is available in the Members Only section of the American Association website. After logging in as a member, click on the “Grant Information” button on the right side menu. When the Area Grants Program is open, this section will also include links to each form, along with a variety of helpful information including the video tutorial, a second video discussing the program’s guidelines, and more. If you require additional assistance, please contact the NY Office.

SUMMARY OF SUBMISSION DATES [Change all dates below to 2022 Timeline]

2021 Area Grants Program Timeline	
Tasks	Date Due
Deadline for 2020 Area Grant follow up form to be submitted online by Area Chair, Area Grant Chair, or designated member – an Area’s 2021 grant allocations will not be released until all 2020 follow up forms are submitted	12/15/2020
Deadline for 2021 Area Grant Chair & Committee names submitted to NY Office	12/30/2020
Zoom Meeting: Explaining the Guidelines of the Area Grants Program	1/12/2021
Email announcing launch of 2021 Area Grants Program	1/19/2021
Program Opens: Organizations invited to apply for online 2021 Area Grants Program	1/19/2021 - 3/19/2021
Zoom Meeting: How to Navigate the Area Grants Program (live tutorial)	1/28/2021
Executive Director notifies Area of the amount of their 2021 allocations	1/31/2021
Final deadline for Areas to approve and submit grant applications online – no grant applications will be accepted after this date	4/30/2021
Submitted grant applications are checked for compliance by NY Office	Ongoing as applications arrive
Executive Director completes protocol review and notifies Controller	5/1/2021 - 5/15/2021
Controller notifies Areas of any errors or omissions in the applications	5/1/2021 - 5/15/2021
Areas correct defects, if required	5/1/2021 - 5/15/2021

Last day to submit corrected grant applications – grants application tool is suspended and all applications are submitted to the American Association Grants Committee	5/15/2021
All 2021 Grant funds have been allocated by the Area for grants or are no longer available for Area use	5/15/2021
American Association Grants Committee reviews and approves grant applications*	5/15/2021 - 6/1/2021
Executive Director notifies Areas of grants approved by American Association Grants Committee	6/1/2021
NY Office creates 2021 Grant Synopsis	6/15/2021
2021 Area Grant checks with Grant Acknowledgment Disclaimer and cover letter are prepared and mailed to grantees	beginning 6/15/2021
Deadline for 2021 Grant follow up form to be submitted online by Area Chair, Area Grant Chair, or designated member	12/15/2021

***If approved, grant checks for COVID-19 emergency food-related assistance will be processed immediately after receipt/review**

Appendix 10 – Setting up a Day of Recollection for an Area

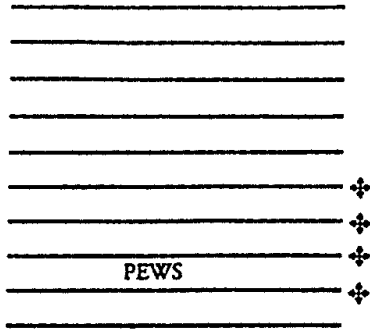
1. It is recommended that an Area have at least two days of recollection scheduled each year, one in Advent and one in Lent. It is important that your Area members are well informed regarding the schedule for the days of recollection. To increase participation over time, it may be helpful to schedule the days at the same time (e.g., on the first Saturdays of Advent and Lent).
2. The Area Chaplain should participate in planning the day.
3. Involve your Ordinary in days of recollection, if possible and appropriate.
4. Ensure that the event is posted on the Area Calendar as soon as the date is set.
5. Written or electronic invitations should be sent up to six weeks in advance in order for people to block their calendars.
6. Follow up with e-mails one to two weeks prior to the event as reminders.
7. Personal calls by Area leadership within one to two weeks of the event will likely increase attendance.
8. The day of recollection should include a Mass, if possible.
9. You should consider whether a luncheon following the event might be a possibility. Participation in many spiritual events can be increased by including a social event as part of the program.

Appendix 11– Setup for Member Funeral

✦ = Knights and D.

● = Family

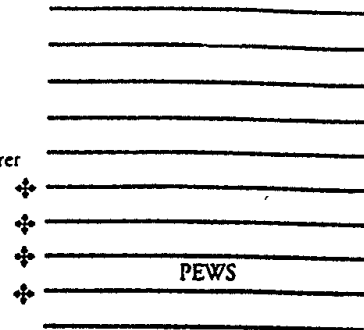
1. Rear of Church



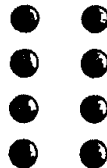
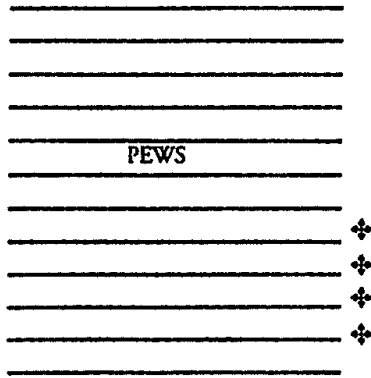
Casket at church entrance

● Priest

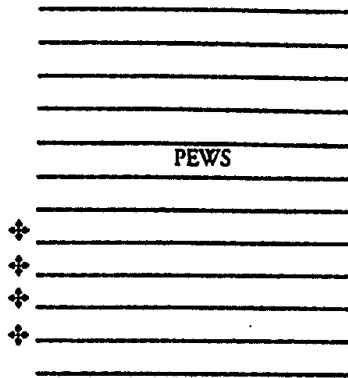
● Cross-bearer



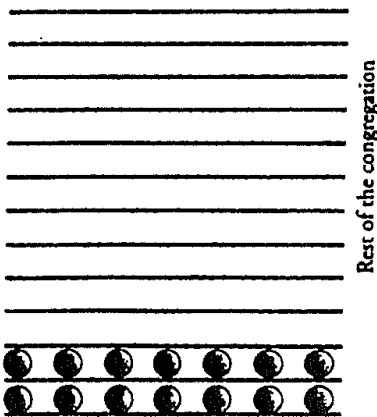
2. Start of Procession



● Priest



3. At Mass



Rest of the congregation

