



District Deputy



Roles, Responsibilities & Resources



New District Deputy Training

June 13th, 2020

- ❖ Each presentation will be made available to all District deputies.
 - ❖ The PowerPoint version has audio attached, links to jump around & links to resources (forms, videos, other websites)
 - ❖ The PDF version is for those who do not have PowerPoint and all links should still work.
 - ❖ A video will also be made available to watch from beginning to end
- ❖ Websites are going through major changes
 - ❖ Supreme is working on a lot of additional information
 - ❖ Michigan website is being completely redone
 - ❖ I will update all presentations in July (or August) as the changes are made public.





Agenda



This symbol will help provide tips and guidance.

- ➔ **1. District Meetings**
- ➔ **2. Roles & Responsibilities**
- ➔ **3. How to get started**
- ➔ **4. Crawl, walk, run**
- ➔ **5. Where to go for help**



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1. District Meetings

- Purpose of a District Meeting
- Tri-District Meeting
- Invitations – Getting the right people to attend
- Meeting logistics
- Lot's to cover in a short amount of time
- Agenda Strategies – Categorize Agenda Items
- District Deputies represent the State Deputy
- Others to invite to your District Meeting





Purpose of a District Meeting



❖ There are three main purposes of a District meeting:

1. **Push** – Pass along important information from the State
2. **Pull** – Pass along important information your Councils want
3. **Lead** – What do “You” think they need to be successful?

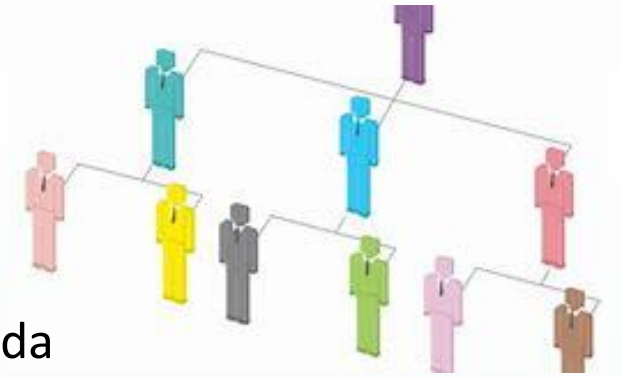
❖ How to measure the success of a District Meeting:

1. **State** – Did you cover all topics the State requested you cover?
2. **Councils**
 - Did your Councils find the meeting as a valuable use of their time?
 - Did they leave motivated, excited, fired up, gung ho, prepared?
3. **Results**
 - Did your councils put into practice what they learned?
 - Did it make them more successful?





Tri-District Meetings



❖ Advantages to Tri-District Meetings:

- Each District Deputy can prepare (and present) part of the agenda
- DDs can “learn” from each other
- “Most” of the material is common anyway
- State/Diocesan guests can attend (*Please coordinate the date of your meeting with your SDRR to ensure he can attend*)

❖ Guidance:

- **Size:** Target 3 Districts per meeting
 - **Fewer (1 or 2)** is OK but minimizes the advantages listed above
 - **More (4 or 5)** is OK but can become too large (difficult to manage)
- **Planning – Meet ahead of time (in person, phone or Zoom)**
 - Have ALL DDs involved in a planning meeting.
 - Have each DD prepare a portion of the material/agenda.



TIP!

Get your SDRR approval for District meetings with < 3 Districts





Council Invitations

- ◆ **Ask for date preferences** – What dates work for your Councils?
- ◆ **E-mail** – Send e-mails (Scheduled, 1 month prior & 1 week prior)
- ◆ **Cell Phone meeting reminders** – Use technology
- ◆ **Remind at Council Meetings** – Take 30 seconds at each meeting
- ◆ **GK RSVP** – Ask each GK to provide a count for his Council
- ◆ **Text the day of** – A morning text ensures they don't forget
- ◆ **Agenda/pre-work** – Send out agenda & pre-work in the email
- ◆ **Council Calendars** – Make sure it is on the Council Calendar
- ◆ **When/where you expect no-shows**
 - ◆ **Host** – Ask problem Councils to Host the District Meeting
 - ◆ **Anticipate excuses** – Eliminate excuses BEFORE they are used
 - ◆ **Accountability** – Hold the GK accountable to “know” the information
 - ◆ **Remote participation** – For those who live “far” from the meeting



Sending a Gmail invitation will provide automatic reminders





Other Invitations

- ❖ **Diocesan Program Director**
- ❖ **Diocesan Membership Director**
- ❖ **Field Agent** (or General Agent)
- ❖ **State Officer**
- ❖ **State Deputy Regional Representative**
- ❖ *Others you deem necessary*



TIP!

Ensure SDRR
schedule allows
him to attend





Meeting Logistics

Covid-19 Recommendations

- ❖ Option 1 – Teleconference (Zoom or other)
 - ❖ Have people join in from the safety of their homes
 - ❖ Technology challenged people can join with a friend
- ❖ Option 2 – In-person AND teleconference
 - ❖ Follow Michigan Covid-19 guidelines (And Parish guidelines as well)
 - ❖ In-person participation for those who can
 - ❖ Teleconference participation for those more vulnerable
 - ❖ Social distance, wear masks, hand-sanitizer rules apply
- ❖ Overall logistics
 - ❖ Have 3 Districts in one meeting (if possible)
 - ❖ Target 90 minutes of actual meeting time
 - ❖ Record the meeting for those who are unable to participate



TIP!

Record the meeting for any people who missed it





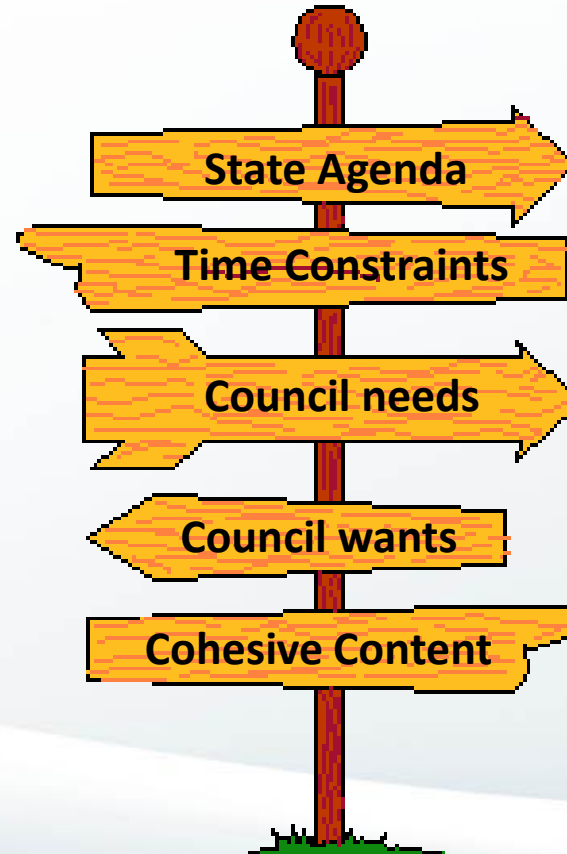
Agenda Challenges

Balance these constraints

You have a list of topics to cover provided by the State Deputy

You have a list of topics your Councils want you to cover

You have a list of topics You believe are important



You have limited time – you will lose them in less than 2 hours

Your material all needs to be cohesive and complementary

Overview State, Diocesan, SDRR and District roles and how they interaction





Agenda Strategies



❖ **Booklet (Hand-outs)** – Minimize the need for note taking

❖ Increases their attention & gives them information to take home

❖ **Pre-meeting** – Gather any homework assignments

❖ **Meeting**

❖ Follow the agenda

❖ Cover important items

❖ Reference (Don't read) the booklet (hand-out)

❖ **Post-meeting** – Reinforce material over next few months

❖ Make meeting recording available to councils for anyone who missed AND for council reference material.





Inter-District cooperation

❖ Membership

- ❖ Share good recruiters to participate in membership drives
- ❖ Create District-wide Exemplification Teams

❖ Programs

- ❖ Consider holding District-wide programs
- ❖ District Picnics, Fraternal Benefit Nights, Clergy Appreciation Dinners

❖ Other

- ❖ Financial – Get all FS's to share Member Management best practices
- ❖ Home Corporations – Encourage all councils support them





2. Roles & Responsibilities



- ❖ Represent the State Deputy
- ❖ Financial – Oversee council's assets
- ❖ Order – Ensure compliance to Laws & Rules
- ❖ Membership – Promotes/Directs Membership efforts
- ❖ Programs – Encourage effective Council programming
- ❖ Leadership – General care & well being of all councils





Represent the State Deputy



State Officers



District Deputy



Council Officers

Pass along vision, plans, direction & goals

Pass along results, successes, failures & issues





Financial – Oversees Councils Assets



**A LOOK
at the
BUDGET**

- ◆ Inspect all council books
 - ◆ Ensures proper handling of council funds
 - ◆ Ensures payment of Supreme & State per capita
 - ◆ Ensure council books are kept as prescribed by law
 - ◆ Directs council Trustees on their duties
 - ◆ In case of dissolution – Take possession of Council books
- ➔ *Watch the Financial Officer Training Video*





Compliance to Laws & Rules of the Order

❖ Ensures that councils follow procedures, laws and rules of the order

➔ [Charter Constitution Laws - 2019](#)





Promotes / Directs Membership Efforts



- ❖ Promote & provide assistance with recruitment & retention
 - ❖ Have a District-wide recruiting team
- ❖ Advise councils on need to keep members active
- ❖ Encourage councils to conduct frequent exemplifications
 - ❖ Get all 1st degree members to go through an exemplification
 - ❖ Short-term – Hold Online Exemplifications (District and Council)
- ❖ Identify locations for new councils and assist in their development



➡ *Watch the Membership Director Training Video*





Encourage effective Council Programs

FAITH IN ACTION



- ❖ Ensure Grand Knights develop & foster a healthy relationship with their Pastor(s)
 - ❖ Encourage programs that support Faith in Action
 - ❖ Steer councils away from programs that compete with their parish(es)
 - ❖ Encourage membership recruiting at all council programs
- ➔ *Watch the Program Director Training Video*





General care and well-being



- ❖ Install council officers as soon as possible
- ❖ Attend all state council organizational & mid-year membership meetings
- ❖ Hold district meetings (Minimum 2/year Maximum = as many as you need)
- ❖ Encourage each council to conduct annual strategic planning meetings
- ❖ Attend council meetings each month (Worst-case quarterly)
- ❖ Monitor completion of council reports/forms
 - ➔ Council Forms Video
 - ➔ Council Forms Spreadsheet
- ❖ File reports with Supreme & State
 - ➔ Supreme District Deputy Forms
 - ➔ Michigan District Deputy Forms





3. How to get started

First 3 months

(July – September)



- ❖ Get Educated
- ❖ Assess your councils
- ❖ Win over your councils
- ❖ Set a good example (Rise up and answer the call)
- ❖ Avoid being the bad guy (if possible)
- ❖ Get 1-2 District Wardens & get them involved





Get Educated



- ➔ DD Training – Officers Online – Fraternal Training Portal
- ➔ How to be a District Deputy *(see next page)*
- ➔ Supreme District Deputy Reports/Forms
- ➔ State District Deputy Reports/Forms
- ➔ Fraternal Operations during Covid-19
- ➔ Fraternal Webinars





HOW TO BE A DISTRICT DEPUTY

TRAINING

Please find below a link to the PowerPoint presentation for your jurisdiction's Organizational Meeting presentation on the new required DD Training as well as an attendance sign-in form.

[District Deputy Training Course](#)

[District Deputy Training Attendance Sign-In Form](#)

LEADERSHIP RESOURCES

#5093 - [Leadership Resources](#)



TIPS FOR SUCCESS

[How to Run an Open House](#)

[Council Health Assessment](#)

[Sample District Meeting Agenda](#)

ADMINISTRATIVE

[944 Form Tips](#)

[Admission Degree Exemplification Schedule](#)

#30 - [Charter, Constitution and Laws](#)

#1831 - [Disability Exemption Application](#)

#5087 - [District Deputy's Guide](#)

#5093 - [Leadership Resources](#)

#10318 - [Method of Conducting Council Meetings](#)

#1612 - [Protocol Handbook](#)

#2235 - [Public Relations and Publicity Guide](#)

[Request for Membership Suspension and Procedures](#)

#1845A - [Retention Billing Procedures](#)

[Sample Suggested District Meeting Agenda](#)

#10238 - [Summary of Financial Secretary's Responsibilities](#)





Council Assessment



- ❖ Previous DD Assessment
- ❖ Grand Knight Assessment
- ❖ Council previous year forms
- ❖ Observe them for 3 months

- ➔ #944A - [District Deputy Semiannual Report](#) – due 12/31
- ➔ #944B - [District Deputy Semiannual Report](#) – due 6/30





Win over your councils

- ❖ Offer to help them and follow through
- ❖ When they ask a question, give a good answer. If you don't know...
 - ❖ Say so & go find the answer (Don't tell them to call someone else)
 - ❖ Don't guess, make up an answer or B.S.
- ❖ Look for opportunities to help
- ❖ Listen to them and fill the needs they see

No age is wanting in able men; it is the duty of wise masters to find them out, win them over, and get work done by means of them, without listening to the calumnies of selfish men against them.



TIP!

- Be an expert
- Become an expert

If you can't answer a question, go find the answer. Don't tell them to call someone else.

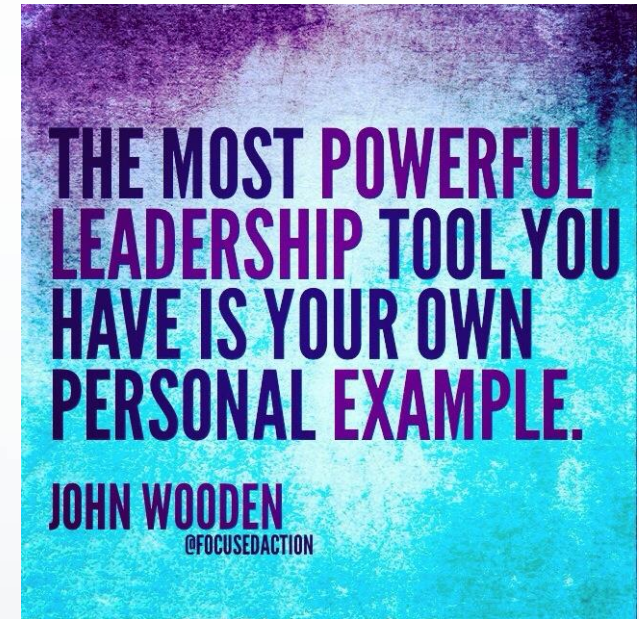




Set a good example

Rise up and answer the call

- ❖ **Educate yourself** on everything
- ❖ **Work hard for them** & they will work hard for you
- ❖ **Be a great recruiter** – actively participate in council recruiting
- ❖ **Be positive and enthusiastic** – Smile are contagious
- ❖ **Set high standards, live them and expect them from others**





Avoid being the bad guy ***Don't expect their respect - Earn it***

- ❖ If you tell them they are wrong...
 - ❖ You don't fully understand the situation
 - ❖ You haven't earned their respect
 - ❖ How will you ever win them over
- ❖ If you see things you don't like...
 - ❖ Weigh it's importance
 - ❖ Observe and understand the situation first
 - ❖ Respond is a positive / helpful way



Set an example.
Treat everyone
with **kindness**
and respect,
even those who
are rude to you —
not because they are nice,
but because you are.

Simple Reminders
SIMPLEREMINDERS.COM



District Wardens

Assign 1-2 and put them to work

- ❖ They are your backup
 - ❖ If you can't make a meeting, council event or exemplification
 - ❖ Find people who compensate for your weaknesses
- ❖ Assign them responsibilities for your District
 - ❖ Forms tracking
 - ❖ Membership
 - ❖ Programs
- ❖ Train them so one day they can replace you
 - ❖ Educate them
 - ❖ Teach them so they can one day be a great District Deputy





4. *Crawl, Walk, Run*



- ❖ Set achievable expectations
 - ❖ Don't set your councils up to fail
- ❖ Struggling Councils – Teach them to crawl
 - ❖ Get them moving in the right direction
- ❖ OK Councils – Teach them to walk
 - ❖ Pick up the pace, Get some positive momentum
- ❖ Good Councils – Teach them to run
 - ❖ They can become great, outstanding and awesome

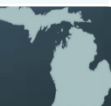




Membership – 1 step at a time



Factor	Crawl	Walk	Run
Membership & Retention Directors	Right person Basic Training Show him how-to	Energize him Advanced Training Observe & mentor	Empower him Support him Clone him
Quota	Ignore Quota Focus on “any” growth	Use as a carrot “if / when achievable”	Double Star
Recruiting	Quarterly	Monthly	All the time
Delta Drives	Share the process & demonstrate	Help them through their 1 st delta drive	Quarterly Delta Drives
Active Members	Follow the retention process	Address “at risk” members	Oversee “all” members
Exemplifications	Provide exemplifications for these councils	Get council members on an exemplification teams	Get council to have their own team
Council Assistance	GK, PGKs, FA, DD, DMD, Pastor & District Team	2-4 regular helpers	5-8 regular helpers Whole council
Recognition	Recognize effort – regardless of results Recognize improvement in results		





Programs – 1 step at a time

FAITH IN ACTION



Factor	Crawl	Walk	Run
Program Director(s)	Right person Basic Training Show him how-to	Energize him Advanced Training Observe & mentor	Empower him Support him Clone him
Program Director(s)	Establish a good Program Director	Faith, Family, Life and Community Directors	Back-ups and many directors
Faith In Action	Educate FIA & BDC Pastor Relationship	Encourage Columbian Award	Encourage submitting a Program book
Recruiting	Recruit at 1 program per quarter	Recruit at 1 program / month	Recruit at all programs
Youth Protection	Get form 365 done Get Directors on board Get council certified	Get council leadership team trained	Get everyone who helps with youth programs trained





Insurance – 1 step at a time



Factor	Crawl	Walk	Run
Field Agent	Invite FA/GA to council meetings	Monthly Insurance	FA on Membership & Retention Teams
Fraternal Benefit Seminars (FBSs)	Invite Council to a District Seminar (to participate)	Council conducts their own FBS	Council hosts a District FBS
Grand Knight	FA / GK Relationship Support Insurance	FA/GK Teamwork	Speaks in lieu of FA Recruits new FAs
Exemplifications	Invite FA to exemplifications	Ask your FA to speak at exemplification (5-min)	FA on your exemplification team





Forms – 1 step at a time



Watch this video to see where to find all forms



Form #	Form Name	Form Type	Form Status	Form Location	Form Date	Form Owner
1101
1102
1103
1104
1105
1106
1107
1108
1109
1110
1111
1112
1113
1114
1115
1116
1117
1118
1119
1120



Use the tracking spread sheet to help keep you on track!

Factor	Crawl	Walk	Run
Knowledge	Aware of what forms are due & when	Understands each form that applies	Expertise in filling out each form
Ownership	GK & FS own all forms Worst case – DD does form	Assigns owners to fill out each form	
Due Dates	Need frequent DD reminders	Needs “a few” DD reminders Has a calendar	Covers forms at officers meeting.





5. Where to go for help



Look up the answers yourself

We provided many websites, documents, videos, etc...

State Deputy Regional Representative (SDRR)

New position this year specifically named to help District Deputies

State personnel

Lots of people here to help you

Look them up in the State Directory & call them up

1. Be nice
2. Try again
3. Forgive
4. Escalate





District Deputy



Questions???

