

Frank Nigro Columbian Foundation
Supporting People with Intellectual Disabilities, Inc.

Council Chairman Form

COUNCIL NAME: _____ COUNCIL NO: _____

Worthy Grand Knight:

The Annual Fund Raising to Benefit People with Intellectual Disabilities requires your input to indicate that your Council will participate in this year's drive and have your Council Chairman on file.

In accordance with the IRS section 501 (c) (3) and Publication 557 Tax-Exempt Status of Your Organization (Rev March 2005), the sub-section "Separate fund-Contributions to which are deductible" funds collected by the organization or its agents for this tax exempt purpose must be organized in such a manner as to prohibit the use of its funds upon dissolution, or otherwise, for the general purpose of the organization creating it. All funds collected by the council acting as an agent of the Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc. are considered to be Public Funds. It is illegal for any council acting as an agent for the Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc. to commingle Public Funds with those of other council accounts. You have thirty (30) days from the close of the Drive to submit your report and remit the funds after paying for your candy and other authorized expenses. All expenses claimed must have receipts attached to the reports sent to the Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

Under no circumstances are you to make distribution directly to organizations or individuals that deal with People with Intellectual Disabilities. Federal and State regulations require that distributions be made only by the Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc., (via the Grand Knight)

YES - We will participate and agree to the terms above

PLEASE PRINT CLEARLY!

| | |
|-------------------|------------------------|
| Council Chairman: | _____ |
| Address: | _____ |
| City: | _____ Zip: _____: |
| Telephone: | AREA CODE (_____)_____ |
| Fax | AREA CODE (_____)_____ |
| E-Mail | _____ |
| PLEASE PRINT | |

_____ Date

_____ Grand Knight

Return To: Ray Warriner
P.O. Box 3062 Cerritos, CA 90703
Columbian.Foundation.President@gmail.com



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
08/19/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

| | | |
|---|--|--------|
| PRODUCER ROBERT M. GALLIGAN & ASSC P. O. BOX 1231 419 SIXTH STREET MARYSVILLE CA 95901 | CONTACT NAME: Liz Needham | |
| | PHONE (A/C, No., Ext): (530) 742-3243 FAX (A/C, No.): (530) 742-5818 E-MAIL ADDRESS: lneedham@galliganinsurance.com | |
| INSURED COLUMBIAN FOUNDATION SUPPORTING PEOPLE WITH INTELLECTUAL DISABILITIES, INC.. DR. RAYMOND WARRINER P.O. BOX 3062 Cerritos CA 90703- | INSURER(S) AFFORDING COVERAGE | NAIC # |
| | INSURER A: NON PROFITS ASSURANCE ALLIANCE OF CA | 10023 |
| | INSURER B: | |
| | INSURER C: | |
| | INSURER D: | |
| | INSURER E: | |
| | INSURER F: | |

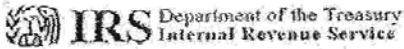
COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS |
|----------|---|-----------|------------|-------------------|-------------------------|-------------------------|---|
| A | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: | | | 2020-65142 | 07/01/2020 | 07/01/2021 | EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 20,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$ |
| A | <input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY | | | 2020-65142 | 07/01/2020 | 07/01/2021 | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ |
| A | <input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$ | | | 2020-65142-UMB | 07/01/2020 | 07/01/2021 | EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$ |
| | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below | | Y/N N/A | | | | PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$ |
| A | DIRECTORS & OFFICERS POLICY | | | 2020-65142-DO-NPO | 07/01/2020 | 07/01/2021 | EACH OCCURRENCE \$1,000,000 GENERAL AGGREGATE \$1,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

| | | |
|--|--|-----------|
| CERTIFICATE HOLDER FOR VERIFICATION PURPOSES ONLY | CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. | AI 116428 |
| | AUTHORIZED REPRESENTATIVE | |



P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248162362
July 15, 2013 LTR 4168C 0
95-4154009 000000 00

00034750
BODC: TE

COLUMBIAN FDN SUPPORTING PEOPLE
WITH INTELLECTUAL DISABILITIES INC
15808 ARROW BLVD STE A
FONTANA CA 92335



22330

Employer Identification Number: 95-4154009
Person to Contact: Mr. McQueen
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your July 03, 2013, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in February 1993.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Richard McKee, Department Manager
Accounts Management Operations

*Frank Nigro Columbian Foundation
Supporting People
With Intellectual Disabilities, Inc.*

***Empowering Programs
that Empower People***



***Annual Fund
Raising Drive
Handbook***

Frank Nigro Columbian Foundation
Supporting People
With Intellectual Disabilities, Inc.

Mission Statement

The Frank Nigro Columbian Foundation is dedicated to improving the quality of life, learning and main stream employment for children, teens, and adults with intellectual disabilities.

The Foundation will accomplish this mission by raising funds to support a variety of state-wide programs like: education in residential care facilities, the Special Olympics, on the job training, and summer camps for people of all ages, regardless of race, creed, color or gender.

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Why We Support People with Intellectual Disabilities

It is estimated that between 7 and 8 million Americans of all ages, or three percent of the general population, experience intellectual disabilities. Nearly 30 million, or one in ten families in the United States, are directly affected by a person with intellectual disabilities at some point in their lifetime.

The Frank Nigro Columbian Foundation Supporting People With Intellectual Disabilities, Inc. (the Foundation) has as its mission to promote and provide financial support to IRS 501(c)(3) organizations providing care and activities for people with intellectual disabilities. This often overlooked and marginalized portion of society often has difficulty in communicating and advocating needs. People with intellectual disabilities learn and process information more slowly, and have difficulty with abstract concepts such as money, time and the subtleties of interpersonal interactions. They may also suffer from autism or sensory impairments or be physically disabled.

It is important the care, safety and quality of life for these individuals be assured, and tailored to their individual needs. It is also important opportunities be provided to interact with the general public, and methods be devised to raise and maintain their self-esteem. To the extent possible, they should be empowered to be independent and involved in their community. The foundation does this with the help of participating Knights of Columbus Councils through cash grants to schools, residential care facilities, work training centers, summer camps and Special Olympics. In the 30+ years the Foundation has been in existence, over **\$19,500,000** has been raised for organizations serving those with intellectual disabilities. **We Empower Programs that Empower People**

The Foundation Board is composed of 20 members, holding formal meetings at least twice within a fiscal year. In addition, the Foundation submits semi-annual reports to the Knights of Columbus California State Council, and over 600 Knights of Columbus councils in the State of California. These reports are the vehicle through which information is provided to state, regional and local leadership regarding participation and issues pertaining to those with intellectual disabilities.

General Instruction

This manual was designed to provide as much assistance as possible. It has been written to carry you through the Annual Fund Raising Drive, from the selection of the Council's Chairman to the final accounting, reporting and distribution of funds.

Included in the following pages of this section are instruction for the forms that will assist you in ordering supplies, soliciting donations and organizing volunteers. All forms are available on our website, www.columbian-foundation.com and emailed to your Financial Secretary and Council Chairman.

The success of any fund-raising venture is predicated on **planning, organization, setting goals and people**. Without these four ingredients, you might be just spinning your wheels. Councils should use volunteers for solicitation and not rely exclusively on Council membership.

We sincerely request that each Council work with us and should there be any questions pertaining to the above, please do not hesitate to contact your District Deputy, Chapter Chairman or Dr. Ray Warriner, PSD. We are here to assist you, and we are anxious for your success.

***Authorized Tootsie Rolls are the only give-away allowed.** "Payment for candy MUST be paid for immediately following the "Drive".*

All funds must be turned in within thirty (30) days following the drive.

Appoint a SITE Captain for each site.

Volunteer Forms are designed to assist you in getting pertinent information from volunteer help. There are two types of forms, one to recruit on an individual basis and another to be used for group sign-ups.

Authorized yellow aprons can be used from year -to-year. You can order aprons directly from the supplier; an order form is included in this section. **Payment for aprons must be paid for immediately following the Drive.**

The Foundation obtains the **NECESSARY INSURANCE** for the Drive. The planning process starts with the Grand Knight's appointment of a Council Chairman. This should not be considered as merely a prestige title position in the Council, but the selection should be made of individuals who can be expected to perform.

With proper organization, the Chairman should be expected to supervise and coordinate the entire operation. He should not devote his time to doing things that are the responsibilities of others. He must be in a position to continuously monitor the performance of others in order to influence them to ensure everything is proceeding according to the timetable.

Set realistic goals for the Council to achieve. Although the drive is conducted in three (3) days, it is imperative to recognize that much has to be done in preparation for this drive.

IF YOU FAIL TO PLAN, YOU PLAN TO FAIL

Council Duties

- Appoint committees such as finance, manpower, publicity, solicitation, etc.
- Work closely with local schools to get their cooperation in obtaining volunteers to assist on the Drive. Many schools have special Christian service or community service projects that the students need. This drive would be ideal.
- Keep in touch with local Pastors and Youth Ministry officials to get their full assistance for volunteers. Many Pastors will let you solicit after Masses.
- Promote the Program within your Council area.
- Order candy and aprons.
- Obtain necessary solicitation permit from local city county, etc.
- Canvas your Council area to see what shopping malls, banks, intersections, etc. would be ideal for solicitation.
- FOLLOW-UP and make sure committees have completed their assignments.
- Instill DESIRE in your membership at Council meetings.
- Have posters and cans distributed to local businesses at least a month before the drive.
- See if there are any "Special Events" in your Council area that coincide with the Drive. These 'events' could include ball games local conventions, or any place the public will congregate.
- Make sure permission is granted from the management of spots where your volunteers will solicit.
- Contact local organizations for People with Intellectual Disabilities for their assistance.
- Attend special meetings called by the Chapter Chairman. This will enable the Council Chairman to fully understand how the program works.
- Make sure the Foundation report form ID 200 is sent to the Foundation along with a check for monies collected attaching receipts for all covered expenses. Ensure that report form ID201 is submitted along with proof of organizations tax exemption under 501(c)(3) of the Internal Revenue Service code. This should be done within thirty (30) days following the drive.
- Thank media businesses, churches etc., and all your workers for their support. Use certificates letters or at least a phone call.

How to Publicize

Important Notice

1. Determine your needs.
2. Call the proper person to let him/her (radio, television, etc.) know that your material is in the mail.
3. General Rules
 - a. Use your personal address.
 - b. Send material at least two weeks before the event.
 - c. Brevity is clarity...the shorter and more concise the news release, the better.

Note: Do not take or use pictures of people with intellectual disabilities without specific permission of parents or guardians.

Suggested Publicity Schedule

August

General story, pertaining to the Drive, sent to newspapers, radio, and television stations. Complete mailing around the State.

Promo picture for the drive, using the props necessary for conducting the drive canisters, candy, aprons, posters, hats, etc. How about a gimmick? A poster boy or girl immersed in a pile of props? Along with the picture, send a release telling how the Knights of Columbus are trying to get an even greater percentage of funds collected and returned to the local community. This is done by soliciting local merchants and businessmen to assist in the campaign and/or asking them to donate funds for the cost of the candy used in the Drive.

September

Tell a story about who benefited from previous Drives.

Story on the number of mayors, city presidents, village trustees, etc. who have issued proclamations for the Drive. Ask for assistance from Chapter Chairman who can help get data on proclamations issued in their areas. Refer to the Solicitation Letters.

October

Relate as to how the Drive has helped the community, adding local flavor by providing statistics on the dollars collected and the many organizations that have been assisted, thanks to the hard work of the various Councils. Statistical data should be procured, well in advance, from The Foundation. Also a commercial about Columbus Day programs in which the Order is taking part, such as parades, essay contest, Supreme Knight's radio message, etc. How the Knights will be wearing their lapel pins during the Columbus Day weekend.

Show what the Program does statewide, emphasizing the high percentage of collections returned to the community. Local stories within each Diocese and each Chapter. Again, an earlier contact with the Chapter Chairman will determine what and where the human-interest stories are. How the Fund Raiser helped in the community over the past year(s). Spot radio and television commercial with a 5-second and 30 second blurb. Shoot out the 50-second commercials for California television stations.

Wrap-up story. This final "shot" should have some special feature to close out the campaign.

Air 15 and 30-second radio commercials, 5 and 15-second slide commercials.

Council Check-Off List

The following are Guidelines for a successful Drive:

- ___ Instill DESIRE and promote the program
- ___ Appoint a Council Chairman
- ___ Instruction for ordering Candy
- ___ Order Candy and Aprons sixty (60) days prior to Drive
- ___ Solicitation Permits
- ___ Public Service Announcements
- ___ People/Volunteers/Sources
- ___ Sample Letter to Pastor
- ___ Public Funds
- ___ Council Chairman Duties
- ___ Send Reports and Receipts (ID 200) of the Drive to Columbian Foundation within Thirty (30) days after Drive.
- ___ Follow-up – All Assignments completed

Instructions for Ordering Candy

AUTHORIZED TOOTSIE ROLLS ARE THE ONLY GIVE-AWAY COVERED BY OUR INSURANCE

Order Forms are available from Columbian Foundation; please contact Jerry Constance, President or the State Office.

1. There is a Minimum 33 Case per Shipping Point in order to avoid shipping chargers
2. Each Council MUST order its own candy. If a council is ordering 33 or more cases for its own drive, they will complete the candy ordering form with their "Ship To" and "Bill To" addresses and forward the form directly to the candy company and the yellow copy mailed to Jerry Constance, Foundation President
3. Councils ordering less than the minimum 33 cases of candy must consolidate and coordinate their order with other councils. Each council must order 5 cases or more. The District Deputies or Chapter Coordinators can assist in placing the orders. If the combined order is 33 or more cases there is no freight charge.
4. Councils ordering 18 to 32 cases will follow the process outlined in item 3, however the order is subject to a 5% freight charge. No orders will be accepted for 17 or less cases

NOTE: Councils consolidating coordinating their orders with other Councils MUST follow these Guidelines:

1. All of the consolidated original (white) candy order forms must be stapled together and mailed directly to the Tootsie Roll Company. Councils must not individually send directly to the Tootsie Roll Company. Doing so can result in late or no candy.
2. Copies must likewise be stapled together and mailed to The Foundation President at PO Box 3062, Cerritos CA 90703.
3. Each Council should keep a copy for its records.
4. Each Council MUST complete its own order form.
5. Each Council MUST use its own "BILL TO" address.
6. Each Council MUST have the same "SHIP TO" address as the council receiving all of the consolidated orders.
7. The telephone number of the "SHIP TO" address must be on each council order form.
8. Each Council can order whatever they need under these guidelines, as long as the consolidated orders equal 33- cases or more follow items 3 and 4 above,.

Please Note: Many Councils don't use the candy, they found that the Apron and Canister give the exposure necessary to obtain the donations and receive as much money as they did when using the candy.

It's your call!

Solicitation Permit

It is the direct responsibility of the Council to make sure the necessary governmental regulations are adhered to with regard to public solicitation.

In most cases obtaining a permit involves only going to the local City, County, or Village Clerk and requesting a permit to solicit within the boundaries of that particular City, County, or Village.

Should there be a fee for that service, it will be reimbursed by funds raised through Council solicitation. This would be considered an authorized expense and should be submitted, WITH RECEIPT, on the Council Report Form, (ID200).

Should the Council want to solicit in their Council area and part of the area includes a City, and is also an unincorporated portion of the County, permits from both the City and the County will be necessary.

Should a particular City have more than one Council, only one permit should be obtained from that City. Copies of the permit should be made for, and distributed to, each Council in that City. This eliminates a duplication of effort on the part of our Councils and the Cities. Your Chapter Chairman or District Deputy can be called on to coordinate this effort.

A copy of any necessary solicitation permit should be made and kept at each solicitation site by the Site Captain so that it can be shown upon request.

Please remember these PERMITS ARE NECESSARY under the Solicitation Act and failure to obtain a required permit could jeopardize our program.

Some Councils are told by their City Hall personnel that a permit for that City is not necessary. The Council should then request that fact in writing and a copy of the letter should be also kept at all solicitation sites. Copies should also be given to any other Council in that City.

501(c)(3):

In order to retain our tax exempt status, the monies that we accumulate must be distributed for charitable purposes dealing with intellectual disabilities. We are responsible for seeing that the money is spent for the purposes specified in our application for a determination letter from the IRS. The board has determined that the best way to meet this requirement is to make donations to 501(c)(3) charities that deal with people with intellectual disabilities. Monies cannot be given to non-501(c)(3) charities, since the money is solicited for people with intellectual disabilities.

Form 990 Tax Return

Local councils of the Knights of Columbus are a fraternal organization under the Internal Revenue Code 501 (c)(8) participating in an annual fund raising derive on behalf of the Columbian Foundation Supporting People With Intellectual Disabilities, Inc. a charity under Code 501 (c)(3). Pursuant to written procedure and forms prepared by the Foundation and distributed to all Councils, a Council remits amounts raised in the drive to the Foundation as follows: the council reports the gross funds raised in the drive, deducts direct expenses of the drive (candy, apron, postage and copying costs; fees of solicitation permits, etc.) backed up with receipts; and submits the net amount to the foundation. All such funds and expenses are reported on the Foundation Form 990 and not the Form 990 of the Knights of Columbus or any local Council.

Public Funds

In order to insure the Columbian Foundation and Knights of Columbus Councils are in compliance with current tax laws, our tax lawyer has recommended the following process be followed.

In accordance with the IRS section 501 (c) (3) and Publication 557 Tax-Exempt Status of Your Organization (Rev March 2005), the sub-section "Separate fund-Contributions to which are deductible" funds collected by the organization or its agents for this tax exempt purpose must be organized in such a manner as to prohibit the use of its funds upon dissolution, or otherwise, for the general purpose of the organization creating it. All funds collected by the council acting as an agent of the Columbian Foundation are considered to be Public Funds. It is illegal for any council acting as an agent for the Columbian Foundation to commingle Public Funds with those of other council accounts. In order to comply with the regulations and governmental requirements the Columbian Foundation Board of directors has established the following procedures for handling of Public Funds:

1. **Council Chairman for the drive:** This person is responsible for collecting the funds from the volunteers and submitting the funds to the Financial Secretary. In addition the chairman will:
Record the names of volunteers and the can numbers assigned to them on a separate sheet of paper. Make sure there are a sufficient number of cans so volunteers will not be passing a can to a volunteer who is relieving them
2. **Financial Secretary:** Will count the money, give the Council Chairman a receipt and submit the funds to the Council Treasurer.
3. **Council Treasurer:** Will count the money and give the Financial Secretary a receipt. In addition the treasurer will:
After your council completes its drive, obtain a money order or cashier's check from the bank and submit it to the Columbian Foundation.
4. **Checks received as donations: All checks received for the ID Drive, i.e., made out to Columbian Foundation, Council, etc. MUST NOT be deposited into a council account. They must be sent along with the form ID 200 to the Assistant Treasurer in order to allow the donor to claim a tax deduction.**

Distribution of Donations

Each council must strictly comply with the Foundation's Handbook procedures whereby a Council must submit a duly-completed Form ID 201 "Request for Distribution" in order to have funds donated to a charity other than or in addition to the Foundation. A Council cannot on its own send any funds to a charity other than or in addition to the Foundation. Such a diversion, no matter how well intentioned, may threaten the Foundation's legal status with the IRS and other government agencies, and also constitutes a misrepresentation to any donor who thought he or she was contributing money to the Foundation.

COUNCIL ACCOUNT:

Funds and Receipts not properly designated by the Council, along with a copy of the necessary 501(c)(3), by September 1st (the year after the Drive). The President may extend said period of time for up to six (6) months upon a Council's written request with good cause appearing therefore.

NOTE: ALL FUNDS MUST BE TURNED IN TO THE FOUNDATION WITHIN THIRTY (30) DAYS FOLLOWING THE DRIVE.

Reports and Expenses:

Important Notice

The individual councils that solicit money for the ID Program are acting as agents of the charitable corporation. They can deduct only the actual cost of the Tootsie Rolls, aprons, postage, printing and Permit Fee. They must remit to the Foundation, immediately after receipt of the money, all money collected less the actual cost of allowable expenses. The Foundation will then proportionately subtract from that amount of money, funds that are needed to operate the Foundation and to establish a reserve for next year's operation. The Foundation's operating costs are approximately 7.5% of net. The remaining balance will be remitted to the council for distribution to charities for people with intellectual disabilities that carry the I.R.S. 501(c)(3) status. These charities are nominated by the originating local council.

Reports

This section is intended to explain the requirements for the filing of final reports on the Drive. The following forms (available at www.columbian-foundation.com or from the State Office) will be sent to you immediately preceding the drive.

1. Report ID 200 - Council Drive Report Form
2. Report ID 201 -Request For Distribution
3. Brochure from recipient

It is recommended that you also file in this section any internal reports that will be useful in drives, such as, total collected by locations or a final report by your Chairman noting shortcoming, pitfalls, recommendations etc.

A word about your report to the Foundation on the Drive. This is a public solicitation for funds as such is considered to be monies collected in trust. Therefore, the whole program is approved under California Law, Federal regulations and given the imprimatur of the Supreme Council. It is run under the auspices of the Columbian Foundation Supporting People With Intellectual Disabilities, Inc. These are permanent approvals only insofar as we conform to laws and Supreme policies. Conformance means filing timely reports with the California Attorney General and the Internal Revenue Service. Any delay could raise the question of a Council using these funds - if only temporarily, for purposes not related to the drive. It cannot be stressed enough that these are "monies held in trust" and as such, cannot be used for any other propose. Even one Council attempting to circumvent the rules can jeopardize the entire program.

You have thirty (30) days from the close of the Drive to submit your report and remit the funds after paying for your candy and other authorized expenses. All expenses claimed must have receipts attached to the reports sent to the Frank Nigro Columbian Foundation Supporting People With Intellectual Disabilities, Inc.

Under no circumstances are you to make distribution directly to organizations or that deal with People with Intellectual Disabilities. Federal and State regulations require that distributions be made only by the Frank Nigro Columbian Foundation Supporting People With Intellectual Disabilities, Inc., (via the Grand Knight)

If a Council is unsure as to where the funds should be distributed, the Council Drive Report (ID 200) should be submitted without the Request for Distribution Form (ID 201). Anything short of conforming with the rules of the game can result in the ordering of your books and records pulled. The State Deputy has this authority.

EXPENSES

The only authorized expenses a Council may deduct from the gross revenue are:

Candy Cost (with copy of invoice)
Apron Cost (with copy of invoice)
Direct Postage Expenses- if any (attach receipts)
Direct Printing Expenses- if any (attach receipts)
Solicitation Permit Fees (attach receipt)

NO OTHER EXPENSES, SUCH AS PAID ADVERTISING, ETC., WILL BE ALLOWED.

Volunteers

It has never been our intention to have strictly Knights of Columbus members and their families run the ID Drive. We certainly want the Knights to work, but only as supervisors or site captains, supervising our volunteers.

It is the volunteer that should be doing all the work, standing on street corners, in front of stores, etc. The Knights of Columbus membership should be making sure that the kids aren't throwing candy at each other and making sure that the new shift comes on time, that they have the necessary candy and aprons. We should be collecting the monies from those whose shift has just ended.

Our Volunteers must know that:

They are working to Benefit People with Intellectual Disabilities.

They Represent the Knights of Columbus.

It has been proven that the more volunteers you have working the better the results. Every can in the hands of a solicitor will add \$50 to \$75 to your total collected.

In addition to council members, some suggested sources from which you can recruit volunteers.

1. Council Members
2. Intellectual Disability Organizations (using children and or adults with Intellectual Disabilities, only with their parents' or guardians permission).
3. Families, friends, relatives
4. Other Fraternal Organizations, such as members of the Elks, Eagles, VFW
5. Ladies' Auxiliaries
6. University Clubs
7. Squires
8. Newman Centers
9. Boy Scout - Girl Scout - Camp Fire Organizations
10. Catholic & Non-Catholic Churches
11. High School Students
12. Civic Groups
13. Parish youth Ministries
14. Confirmation Classes

It is particularly important to approach groups that deal first hand with the intellectually disabled, such as institutions and parents' groups, as in most instances they are quite cooperative. After all, they are the ones to benefit from the distribution of your funds.

You might consider appointing Council members to recruit volunteers from specific sources. For example, someone should be designated to work with high school students and another with intellectually disabled organizations, etc. If you should need assistance, call upon your District Deputy, Chapter Chairman, or any Foundation Officer.

Ask if they can work for at least 2 hours. You will find most people can get away for two hours but sometimes not any longer. The highest productive hours are:

1. The two rush hours in the morning
2. The two rush hours at lunch time
3. The two rush hours in the evening

Locations --- General Information

You should have some first-hand knowledge as to the best time to solicit and whether the locations will be properly staffed. Some examples of locations to be solicited are:

1. Key street intersections for both auto and sidewalk traffic
2. Commercial and Savings Bank Buildings
3. Shopping centers or malls
4. Railroad, airports and bus commuter stations
5. Special community functions (sporting events, county fairs, etc.)
6. Supermarkets
7. Factories
8. Churches

As a matter of courtesy, it is important that you contact business establishments for permission to solicit. Some businesses might object, so it is imperative to ask first, to avoid a public confrontation the day of the drive. **A sample letter is included in this handbook.**

In areas where there is more than one Council, it is suggested that you honor your neighboring Councils' "territorial limits," whether they are well defined or not. If you know that a neighboring Council does not cover a key location, advise that Council's Grand Knight that you would like the location. Avoid any public bickering by clearing the air before the drive. Your District Deputy can assist coordinating in differences like this.

As a word of caution, do not spread yourself too thin, that is, do not attempt to cover too many locations if you do not have the staffing. Setup location assignments for the best locations first and cover the poorer ones last.

Some Councils have found it advantageous to leave cans in the stores of local merchants. Should you decide to do this, here are some useful tips:

1. Have the can displayed for a month before the drive.
2. Do not leave candy with the can.

3. Mount the can on a piece of cardboard or a poster.
4. Record the stores where cans are displayed to make sure they will all be picked up the day after the drive ends. Arrange with the merchant to identify persons picking up cans.

Recognition Program

Participation:

Council: Every Council that registered chairman, submit the Council Drive Report Form (ID200) and have raised at least a \$1 will receive a participation certificate.

District Deputies: A District Deputy having 100% participation* of their Councils and the Foundation receiving Council Drive Report Form (ID200) with the net proceeds by April 1 will receive a plaque at the State Convention.

Chapters: The Three (3) Chapters who have the highest participation by their Councils in the Chapters will receive a plaque at the State Convention. (Must be received by April 1)

Revenue:

Council: Those Councils who have gross revenue of \$4,000.00 or more will receive a plaque at the State Convention. All revenues must be received by April 1, to be eligible for the award.

District Deputies: A 100% District Deputy having the Highest Gross Revenue in his District (Top District Award) will receive a plaque at the State Convention. (Based on April 1 data)


Chapters: The Three (3) Chapters who have the highest gross revenue by their Councils in the Chapters will receive a plaque at the State Convention. (Must be received by April 1)

*For purposes of District and Chapter Participation Awards, a council must (1) have a registered chairman, (2) submit the Council Drive Report Form (ID200) and (3) have raised at least a \$1 per member or \$100 (whichever is less)


Samples and Supporting Material

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These are samples only, the most current samples, supporting material and forms are located on the website at <http://columbian-foundation.com/>

 **IRS** Department of the Treasury
Internal Revenue Service
P.O. Box 2598
Cincinnati OH 45201

In reply refer to: 0248162362
July 15, 2013 LTR 4168C 0
95-4154009 000000 00
00034750
BODC: IE


COLUMBIAN FDN SUPPORTING PEOPLE
WITH INTELLECTUAL DISABILITIES INC
15808 ARROW BLVD STE A
FONTANA CA 92335

22330

Employer Identification Number: 95-4154009
Person to Contact: Mr. McQueen
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your July 03, 2013, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in February 1993.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Richard McKee, Department Manager
Accounts Management Operations

Figure 1 IRS Tax Exempt Letter



CERTIFICATE OF LIABILITY INSURANCE

CP ID: 80

DATE (MM/DD/YYYY)
07/31/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

| | | | | | | | | | | | | | |
|--|---|--|--------------------------------|-------|---------------------------------|-------|------------|--|------------|--|------------|--|------------|
| PRODUCER S. A. Van Dyk, Inc. 1010 Jorda Boulevard, Suite 242 P.O. Box 4806 Oak Brook, IL 60522-4806 | CONTACT NAME PHONE FAX E-MAIL ADDRESS PRODUCER LICENSE # KNIGH-3 | | | | | | | | | | | | |
| | INSURED Columbian Foundation Supporting People with Intellectual Disabilities, Inc ROBERT ROCHE 1045 Stonybrook Drive Napa, CA 94558 | INSURER(S) AFFORDING COVERAGE <table border="1"> <tr><td>INSURER A - St. Paul Travelers</td><td>19038</td></tr> <tr><td>INSURER B - Travelers Insurance</td><td>19038</td></tr> <tr><td>INSURER C:</td><td></td></tr> <tr><td>INSURER D:</td><td></td></tr> <tr><td>INSURER E:</td><td></td></tr> <tr><td>INSURER F:</td><td></td></tr> </table> | INSURER A - St. Paul Travelers | 19038 | INSURER B - Travelers Insurance | 19038 | INSURER C: | | INSURER D: | | INSURER E: | | INSURER F: |
| INSURER A - St. Paul Travelers | 19038 | | | | | | | | | | | | |
| INSURER B - Travelers Insurance | 19038 | | | | | | | | | | | | |
| INSURER C: | | | | | | | | | | | | | |
| INSURER D: | | | | | | | | | | | | | |
| INSURER E: | | | | | | | | | | | | | |
| INSURER F: | | | | | | | | | | | | | |

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE PROVIDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR. TR. | TYPE OF INSURANCE | INSURER | POLICY NUMBER | POLICY EFF. DATE (MM/DD/YYYY) | POLICY EXP. DATE (MM/DD/YYYY) | LIMITS | |
|-----------|--|-----------|--------------------------|-------------------------------|-------------------------------|--------------------------------------|--------------|
| A | GENERAL LIABILITY | X | X050431X8967TCT14 | 12/31/2014 | 12/31/2015 | EACH OCCURRENCE | \$ 1,000,000 |
| | COMMERCIAL GENERAL LIABILITY | | | | | UNWAIVED CONTRACTS | \$ 100,000 |
| | | | | | | CLAIMS-MADE | 5,000 |
| | | | | | | PERSONAL AND ADJ. LIAB. | \$ 1,000,000 |
| | | | | | | GENERAL AGGREGATE | \$ 2,000,000 |
| | | | | | | PRODUCTS - COMPLETED | \$ 2,000,000 |
| | GEN'L AGGREGATE LIMIT APPLIES PER POLICY | | | | | | |
| B | AUTOMOBILE LIABILITY | | | | | COMBINED SINGLE LIMIT (Per accident) | \$ |
| | ANY AUTO | | | | | BODILY INJURY (Per person) | \$ |
| | ALL OWNED AUTOS | | | | | BODILY INJURY (Per accident) | \$ |
| | SCHEDULED AUTOS | | | | | PROPERTY DAMAGE (Per ACCIDENT) | \$ |
| | HIRSD AUTOS | | | | | | \$ |
| | NON-OWNED AUTOS | | | | | | \$ |
| B | UMBRELLA LIAB. | | | | | EACH OCCURRENCE | \$ 2,000,000 |
| | EXCESS LIAB. | | XSM-CLIP-37967688-TIL-14 | 12/31/2014 | 12/31/2015 | AGGREGATE | \$ 2,000,000 |
| | DEDUCTIBLE | | | | | | \$ |
| | RETENTION | \$ 10000. | | | | | \$ |
| | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY | | | | | INDUSTRIAL DISABILITY | CT/ST |
| | ANY PROPERTY DAMAGE EXECUTIVE OFFICERS' AND DIRECTORS' LIABILITY (Necessary in MI) | | | | | EL EACH ACCIDENT | \$ |
| | Public Auto for state | | | | | CL DISCARD - EACH POLICY | \$ |
| | DESCRIPTION OF OPERATIONS BELOW | | | | | CL DISCARD - POLICY LIMIT | \$ |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, additional Remarks Schedule, if more space is required)
Toolite Roll Drive

| | |
|---------------------------|--|
| CERTIFICATE HOLDER | CANCELLATION |
| | SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
| | AUTHORIZED REPRESENTATIVE <i>Margaret E. Van Dyk</i> |

ACORD 25 (2009/09)

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Figure 2 Insurance Certification

Business Solicitation for Funds

(On Council Stationery)
(Include a Return Envelope)

Dear _____

We need your help to make this year's Knights of Columbus Annual Fund Raising Drive a success. Our goal is to raise (Council goal) to benefit People with Intellectual Disabilities.

Members of (Name of Council), their wives, families, and friends, will be volunteering their services on (dates), to raise funds. The volunteers will distribute candy and solicit contributions in the name of the Knights of Columbus. The candy is purchased with contributions from individuals and businesses such as yourself.

You can help make our Drive a success by contributing \$25.00 or more to underwrite a case of candy. We urge you to become a contributor to the Knights of Columbus Annual Fund Raising Drive by sending a contribution. Our proceeds go to Benefit People with Intellectual Disabilities right here in our own community.

Please make our check payable to the Columbian Foundation. Your donation is tax deductible and a receipt will be sent, upon request. We are qualified as a Charitable Corporation under Section 501(c)(3) of the Internal Revenue Code and Section 23701 of the comparable California statutes.

The Knights of (Council or Community Name) deeply appreciate and thank you for your support.

Cordially,

Grand Knight

.....
RETURN ENDORSEMENT

We are pleased to help the Knights of Columbus Annual Fund Raising Drive by contributing \$__

Name of Company: _____

Address of Company: _____

Receipt Requested: Yes ___ No ___

* Note Council Chairman: Attach receipt request to check and send to the Foundation Treasurer when Council Report Form UD 200) is submitted.

Figure 3 Business Solicitation for Funds

Initial Press Release

(Retype On Your Council Stationery)

FOR IMMEDIATE RELEASE:

Knights of Columbus Annual Fund Raising Drive Kicks Off (DATES OF DRIVE)

The 75,000 members of the Knights of Columbus in California and their volunteers will conduct their Annual Fund Raising Drive in communities across the state to raise funds to benefit People with Intellectual Disabilities.

The Drive will be held on Friday, Saturday and Sunday, (dates here). The Knights of Columbus are urging citizens everywhere to support this important fund raising activity by making a donation.

Every nickel, dime and dollar is needed and will be deeply appreciated.

In (Community), the Knights of Columbus Drive will be coordinated by (Council Name). (G.K. Name) suggests that those wishing to learn how they may help can contact (Name of Chairman) Chairman of the Drive, at (Chairman's Telephone Number).

Knights of Columbus volunteers will be easily visible because of the bright yellow aprons they will be wearing and the canisters and candies they will be carrying.

People with Intellectual Disabilities need the support of the general public so that they can develop and be productive contributing members of society.

Thanks to programs, like the one conducted by the Knights of Columbus, the future continues to look promising.

Figure 4 Initial Press Release

Public Service Announcement

Each Public Service Announcement (PSA) runs approximately once every other day. Generally a PSA can be aired anywhere from one week for dated announcements to one month for non-dated announcements.

Public Service Announcements should be 30 to 60 seconds in length. (Each station is different and should be checked for their own policies for a PSA.)

All PSAs are accepted from nonprofit, tax exempt organizations dealing with non-controversial topics.

Tapes, as well as live copy, are accepted. This copy is written by the organization and edited by the Community Relations Director if necessary. If pamphlets on the organization's services are provided, the announcement can be written by the Community Relations Director.

Exact times for airing public service announcements are not generally given. They are done on a rotation basis.

Disc Jockey & Television Shows

(Retype On Your Council Stationery) Mail One Month before the Drive

The (number) Annual State-wide Fund Raising Drive for People with Intellectual Disabilities will be conducted by the Knights of Columbus and volunteers on Friday, Saturday, and Sunday, (dates here).

Some noteworthy facts:

1. This is a State-wide effort in which over 75,000 members of the California Knights of Columbus participate.
2. Many of the volunteers come from the organizations benefiting most from this program.
3. The funds raised by individual Knights of Columbus Councils are donated to respite care homes, training centers or other approved facilities for People with Intellectual Disabilities.
4. Since the pilot program was initiated by the Illinois Knights of Columbus in 1970, millions of dollars have been raised annually in similar programs across the United States.
5. Other than the cost of the candy, expenses are negligible, resulting in a distribution of more than 90% to organizations caring for People with Intellectual Disabilities..
6. Forty-four states have since adopted the Illinois Tootsie Roll program.
7. Our goal, again this year, is to raise \$1,000,000 in California.

As you well know, a program of this sort can only be successful through "people awareness," and for that reason we would appreciate any mention from you of this very fine program.

Very truly yours,

Figure 5 Public Service Announcement

Sample Letter to Pastor
(On Council Stationery)

Reverend _____
Simon and Jude Church
1224 My Street
Anytown, CA 92646

Dear Reverend _____

On (dates), the Knights of Columbus will be conducting our Annual Fund Raising Drive to Benefit People with Intellectual Disabilities. In the past we have solicited donations from shoppers and motorists, and we will do so again this year.

We are asking for your assistance with regard to publicizing the drive in our Parish Bulletin. Below is a brief paragraph which would be more than sufficient.

KNIGHTS OF COLUMBUS ANNUAL FUND RAISING DRIVE:

_____ Council of the Knights of Columbus will be conducting its Annual Fund Raising Drive to Benefit People with Intellectual Disabilities, right here in our own community. The Council would appreciate your support in any form. If you wish to serve as a volunteer fundraiser for a couple of hours on either (dates), please call:

Name

Phone Number

Thank you so much Father, for your Assistance. Please give us a call at (Phone Number and Name) if we can be of any assistance to you and the fine work of our Parish.

Respectfully,

Council Chairman

Figure 6 Sample Letter to Pastor

Sample Proclamation

Councils should request a proclamation from their Mayor, City Council and/or County Government. This should be done two to three months before the drive. A sample is shown below:

WHEREAS, the Knights of Columbus in the State of California, have undertaken a project of assistance for the treatment and care of People with Intellectual Disabilities, and

WHEREAS, the over 75,000 members of the Knights of Columbus in California and their volunteers are conducting their Annual state-wide Fund Raising Drive in the communities of California, and

WHEREAS, the proceeds of this campaign will be distributed to nonprofit agencies and institutions dedicated to benefit People with Intellectual Disabilities,

NOW, THEREFORE, I, _____, Mayor of the City of (City Name), California, do hereby proclaim (Dates) **BENEFIT PEOPLE WITH INTELLECTUAL DISABILITIES DAYS** and urge all citizens to take cognizance of and cooperate in this campaign.

IN WITNESS WHEREFORE, I have hereunto set my hand and caused the seal of the City of (City Name) to be affixed, the day of (Month) in the year of Our Lord, two thousand and (Year).

Figure 7 Sample Proclamation

Campaign Supporting People with Intellectual Disabilities



HELPING
PEOPLE
WITH
INTELLECTUAL
DISABILITIES

KNIGHTS OF
COLUMBUS



Special Religious Development (SPRED)

Special Olympics
St Madeleine Sophies Center
Schelby School
Noah Homes



Day of Sharing

Camp ReCreation
Lincoln Training Center
Hope Rehabilitation Center
The ARC



**Thank You
Knights of Columbus
for Supporting Us**



Special Olympics Plane Pull

Your donations supported over 170 programs throughout California



Intellectual Disabilities Drive



Special Olympics Polar Plunge

Frank Nigro Columbian Foundation
Supporting People with Intellectual Disabilities

PO Box 3062 Cerritos CA 90703

REPORTS/EXPENSE INSTRUCTIONS

This section is intended to explain the requirements for the filing of final reports on the Drive. The following forms (shown on the ensuing pages of this section) will be sent to you immediately preceding the drive.

- Report ID 200 - Council Drive Report Form
- Report ID 201 - Request For Distribution
- Brochure from recipient

It is recommended that you also file in this section any internal reports that will be useful in future drives, such as, total collected by locations or a final report by your Chairman noting shortcoming, pitfalls, recommendations etc.

A word about your report to the Foundation on the Drive. This is a public solicitation for funds and as such is considered to be monies collected in trust. Therefore, the whole program is approved under California Law, Federal regulations and given the imprimatur of the Supreme Council. It is run under the auspices of the Columbian Foundation Supporting People with Intellectual Disabilities, Inc. These are permanent approvals only insofar as we conform to laws and Supreme policies. Conformance means filing timely reports with the California Attorney General and the Internal Revenue Service. Any delay could raise the question of a Council using these funds - if only temporarily, for purposes not related to the drive. It cannot be stressed enough that these are “monies held in trust” and as such, cannot be used for any other propose. Even one Council attempting to circumvent the rules can jeopardize the entire program.

You have thirty (30) days from the close of the Drive to submit your report and remit the funds after paying for your candy and other authorized expenses. All expenses claimed must have receipts attached to the reports sent to the Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

Under no circumstances are you to make distribution directly to organizations or individuals that deal with People with Intellectual Disabilities. Federal and State regulations require that distributions be made only by the Columbian Foundation Supporting People with Intellectual Disabilities, Inc., (via the Grand Knight)

If a Council is unsure as to where the funds should be distributed, the Council Drive Report Form (ID200) should be submitted without the Request for Distribution Form (ID201).

Anything short of conforming with the rules of the game can result in the ordering of your books and records pulled. The State Deputy has this authority.

EXPENSES

The only authorized expenses a Council may deduct from the gross revenue are:

1. Candy Cost (with copy of invoice)
2. Apron Cost (with copy of invoice)
3. Direct Postage Expenses - if any (attach receipts)
4. Direct Printing Expenses - if any (attach receipts)
5. Solicitation Permit Fees (attach receipt)

NO OTHER EXPENSES, SUCH AS PAID ADVERTISING, ETC., WILL BE ALLOWED.

Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

COUNCIL DRIVE REPORT FORM

COUNCIL NO. _____ DISTRICT NO. _____ DATE _____

PLEASE FILL OUT ENTIRE FORM

GROSS REVENUE \$ _____

Less Allowable Expenses:

1. Candy Cost \$ _____
(Attach copy of invoice, date paid and check number)
2. Apron Cost \$ _____
(Attach copy of invoice, date paid and check number)
3. Direct Postage Expense - If Applicable \$ _____
(Attach copy of receipts)
4. Direct Printing Expense - If Applicable \$ _____
(Attach copy of receipts)
5. Total Expenses \$ _____
(Sum of lines 1 thru 4)
6. Total Remittance to Columbian Foundation \$ _____
(Subtract line 5 from Gross Revenue)
7. Number of leftover candy cases _____ Leftover Candy Cases

Note: Invoices or Receipts must support All expenses.

Attach such documentation to this form and mail with your check.

**THIS REPORT MUST BE SUBMITTED THIRTY (30) DAYS
FROM THE LAST DAY OF THE DRIVE**

Make check payable to: Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

MAIL FORM AND CHECK TO:

Melvin Picanco Tel: 209.629.8051
2454 Shadow Berry Dr. Fax: 209.629.8051
Manteca, CA 95336 mpicanco@comcast.net

RETAIN COPY FOR YOUR COUNCIL RECORDS

We hereby certify under penalty of perjury that the above accounting is true and correct.

Signatures _____
Grand Knight

Financial Secretary

Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

COUNCIL DRIVE REPORT FORM

COUNCIL NO. _____ DISTRICT NO. _____ DATE _____

PLEASE FILL OUT ENTIRE FORM

GROSS REVENUE \$ _____

Less Allowable Expenses:

1. Candy Cost \$ _____
(Attach copy of invoice, date paid and check number)
2. Apron Cost \$ _____
(Attach copy of invoice, date paid and check number)
3. Direct Postage Expense - If Applicable \$ _____
(Attach copy of receipts)
4. Direct Printing Expense - If Applicable \$ _____
(Attach copy of receipts)
5. Total Expenses \$ _____
(Sum of lines 1 thru 4)
6. Total Remittance to Columbian Foundation \$ _____
(Subtract line 5 from Gross Revenue)
7. Number of leftover candy cases _____ Leftover Candy Cases

Note: Invoices or Receipts must support All expenses.

Attach such documentation to this form and mail with your check.

**THIS REPORT MUST BE SUBMITTED THIRTY (30) DAYS
FROM THE LAST DAY OF THE DRIVE**

Make check payable to: Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

MAIL FORM AND CHECK TO:

Melvin Picanco Tel: 209.629.8051
2454 Shadow Berry Dr. Fax: 209.629.8051
Manteca, CA 95336 mpicanco@comcast.net

RETAIN COPY FOR YOUR COUNCIL RECORDS

We hereby certify under penalty of perjury that the above accounting is true and correct.

Signatures _____
Grand Knight

Financial Secretary

Frequency Asked Questions:

Checks:

Who should checks be made payable to?

The official name of the organization is the Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc. but I realize people most like will want to use a shorter version.

Almost anything will do, the simplest is Columbian Foundation

What if someone makes a check out to the Council or Knights of Columbus?

In this case send the check to the Foundation. We will deposit it and the writer will be able to get their tax deduction since the cancelled check will show the proper 501c3 organization. You should not deposit it into the Council account, this is comingling of funds and the writer loses any ability for a tax deduction.

Cash Donations:

What do I do with the cash donations?

The cash donations should be converted to a cashier's check in favor of the Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc. or simply the Columbian Foundation.

Where do I send the Contributions?

The donations along with the completed Drive Report Form (Form 200) and Distribution (Form 201) should be sent to:

Frank Nigro Columbian Foundation Supporting People with Intellectual Disabilities, Inc. or simply the Columbian Foundation

ATT: Melvin Picanco
2454 Shadow Berry Dr.
Manteca, CA 95336

How can I verify that the Foundation received our contribution?

Br. Mel Picanco receives all the contributions on behalf of the Foundation. The preferred method would be through email to mpicanco@comcast.net with a cc to columbian.foundation.president@gmail.com. He can also be reached by phone or fax. Tel: 209.629.8051 Fax: 209.629.8051

Columbian Foundation Supporting People with Intellectual Disabilities, Inc.

REQUEST FOR DISTRIBUTION

COUNCIL NO. _____ DISTRICT NO. _____ DATE ____

PLEASE AUTHORIZE THE FOLLOWING DISTRIBUTION FROM OUR ACCOUNT:

| NAME OF RECIPIENT | ADDRESS | PERCENTAGE |
|--|--------------|--------------|
| _____ | _____ | _____ % |
| _____ | _____ | _____ % |
| _____ | _____ | _____ % |
| Special Olympics [FEED THE ATHLETES], a Supreme Featured Program | _____ | _____ % |
| Columbian Charity Fund | _____ | _____ % |
| | TOTAL | 100 % |

Note 1: Distribution can only be made to organizations working with People with Intellectual Disabilities that have I.R.S. tax exemption under 501(c) (3) of the Internal Revenue Code. Attach proof of such exemption to this form for each Recipient listed above

Note 2: All funds not properly designated by the Council, and/or recipient or receipts for expenditures, along with a copy of the necessary 501(c)(3), by September 1st of the year following the Drive will automatically and irrevocably be deposited in the Charity Fund.

Grand Knight Information: Name _____
Address _____
City, State, Zip _____
Phone (_____) _____ - _____

MAIL TO: **Melvin Picanco**
2454 Shadow Berry Dr., Manteca, CA 95336

RETAIN COPY FOR YOUR COUNCIL RECORDS

Signatures _____
Grand Knight **Financial Secretary**

| | | |
|------------------------------|----------------|-----------|
| FOR OFFICE USE ONLY | ACCOUNT NUMBER | SHIP DATE |
| | | |



Knights of Columbus



TOOTSIE ROLL ORDER FORM

CASES
ORDERED

ITEM NO

914

KNIGHTS OF COLUMBUS
TOOTSIE ROLLS
300 COUNT PER CASE

COST

TOTAL COST

\$19.50
Case

ORDERS WITH 33 CASES OR MORE WILL BE SHIPPED WITH NO FREIGHT CHARGES.

ORDERS PLACED FOR 18-32 CASES WILL BE SUBJECT TO A FREIGHT CHARGE OF 5% OF THE TOTAL ORDER.

ORDERS OF 17 CASES AND UNDER WILL NOT BE ACCEPTED OR SHIPPED UNLESS COMBINED WITH OTHER COUNCILS FOR A TOTAL OF 18 CASES OR MORE TO THE SAME SHIPPING LOCATION. EACH COUNCIL MUST BE 5 CASES OR MORE.

CASES
ORDERED

ITEM NO

9690

INDICATE THE NUMBER OF K/C CAPS AND COLLECTING CANISTERS NEEDED. THERE ARE 12 TO A CASE, ONE CASE WITH EVERY 16 CASES OF CANDY ORDERED.

NONE WILL BE SHIPPED IF LEFT BLANK.

This MUST be a business address with a daytime phone number.
RESIDENTIAL ADDRESS WILL NOT BE SHIPPED.

SHIP TO:

Address _____

City _____

State _____ Zip _____

Phone _____

MUST BE A COUNCIL

BILL TO:

Council Name _____

No. _____

Address _____

City _____

State _____ Zip _____

AGREEMENT OF SALES

I agree to pay the invoice amount within 30 days after completion of drive unless I request and am granted additional time by you in writing.
I must inform you in advance before a return can be made and then only unopened cases totaling not more than 10% of the total order.
I shall prepay freight on all returned candy. No candy may be returned after 60 days from the date of invoice.

Print Name _____, Financial Secretary Phone # _____

Print Name _____, Chairman Phone # _____ Date of Drive _____

Council No. _____ No. of Cases _____ Council No. _____ No. of Cases _____

Council No. _____ No. of Cases _____ Council No. _____ No. of Cases _____

SEND NO MONEY WITH ORDER

Send Original to: TOOTSIE ROLL K/C PROGRAM
P.O. Box 633, Oak Lawn, IL 60454

KC-001

Send Copy to : Frank Nigro Columbian Foundation
PO Box 3062, Cerritos CA 90703

ALL ORDERS MUST BE RECEIVED
30 DAYS PRIOR TO SHIPMENT

Tootsie Roll Ordering Instructions

- Order Candy and Aprons sixty (60) days prior to Drive
- AUTHORIZED TOOTSIE ROLLS ARE THE ONLY GIVE-AWAY COVERED BY OUR INSURANCE
- **Order Forms are available from Columbian Foundation; please contact Ray Warriner or the State Office.**
- There is a Minimum 33 Case per Shipping Point in order to avoid shipping chargers
- Each Council MUST order its own candy. If a council is ordering 33 or more cases for its own drive, they will complete the candy ordering form with their "Ship To" and "Bill To" addresses and forward the form directly to the candy company and a copy mailed to Dr. Ray Warriner, Foundation President at PO Box 3062 Cerritos, CA 90703.
- Councils ordering less than the minimum 33 cases of candy must consolidate and coordinate their order with other councils. Each council must order 5 cases or more. The District Deputies or Chapter Coordinators can assist in placing the orders. If the combined order is 33 or more cases there is no freight charge.
- Councils ordering 18 to 32 cases will follow the process outlined in item 3, however the order is subject to a 5% freight charge. No orders will be accepted for 17 or less cases