

**The Committee to Study the Proposed Name Change**  
**Update August 2017**

**Submitted by:**

**Joanne Tomassi, Past National Regent**

As previously reported, each member of the team was asked to research one or more subjects. At this time, we would like to share a summary of the findings. These are preliminary findings based on a few members of the team. Prior to presenting a final report, we will come together to discuss all areas as a group. In order to provide all aspects of this subject, we felt we all needed to give input together. Our organization faces a big decision; should we change our name to Catholic Daughters of the World or should we remain Catholic Daughters of the Americas.

Several other ideas and options have been submitted from various courts and members. They may warrant future discussion. However, the assigned task of this committee is to analyze the pros and cons of making the change and report our findings.

The first subject on the list addresses the procedures and steps to change a corporate name in the State of New York. According to our attorney, "the Corporation can change its name by amending their certificate of incorporation and filing the amendment with the secretary of State and notifying the United States Catholic Conference of Catholic Bishops (sic.) regarding the name change and the IRS. However, if the Corporation changes its name, it is possible all of the Courts would have to change their name as well because they are all listed as Catholic Daughters of the Americas Court xxx. The Courts are not separate legal entities..." She goes on to say "I believe we should be involved because of the issues we have had in the past with the tax exempt status of the Corporation and the Courts, which may be impacted by filing the change of name with the IRS." These steps, if there are no complications, would probably take a few months and cost under \$15,000 - \$20,000. However, if the name changes, the copyright filing will only apply to the original name and logo. A new filing will be required as well. This process took six to seven months to complete and cost an additional \$6,000 between attorney fees and filing fees. As the attorney said, the 501 (c) 3, non-profit status with the IRS may have to be re-established as well. Part of that process is dependent on our listing in the Catholic Directory which is published yearly. Timing would have to be considered so as to not cause a delay in this filing. Also, each subsidiary, in this case, each court would have to change their legal paperwork such as bank account registrations, sales tax exemptions, property registrations, etc. to reflect the new name, ie. Catholic Daughters of the World Court xxxx # xxxx. On all levels, national, state and local, the paperwork to apply for an employer identification number would have to be filed under the new name. There was not a definitive answer regarding a change of number or just amending the name on the existing EIN.

The next subject had to do with our branding, our identity. The team to study this area raised several areas of concern. For decades we have been told we are the "best kept secret of the Catholic Church." A change of name at this time would only bury that secret further. Approximately four decades ago our name changed from Catholic Daughter of America to Catholic Daughters of the Americas. Yet, countless times we hear people refer to us by our old name. There is still confusion. National, State, and Local courts that currently have a presence on the internet or other forms of recruitment would assume the expense of making the necessary changes; websites, Face Book, print ads in bulletins and Catholic newspapers, etc. If current websites are not removed, it would be difficult for a person searching for Catholic Daughters of the World because the old websites would show as well. (In an internet search, it

was discovered there are many Catholic Daughters of the Americas courts online.) A name change could cause an identity problem as it relates to name recognition for projects already accomplished by the Catholic Daughters of the Americas, such as the Glorious Mysteries at the National Shrine in Washington DC, Habitat for Humanity, and other projects.

The third subject is in reference to banking. All courts would be impacted by a change of name. The rules for changing the name on an organization account vary from bank to bank and state to state. Most banks reported they would require official proof of the change of name such as minutes of the corporate meeting. Most banks also said they would need to verify the employer identification number matches the new name. For the most part, the larger banks reported they would require a new account be opened and the old account be closed. Proof of the name change would allow the funds to go from one account to the other. New signature paperwork, new checks, endorsement stamps, etc. would also be needed.

Next we looked at Supplies, paraphernalia, jewelry, brochures, etc. The cost of existing materials would be based on inventory and would be a write-off if we make the change. The replacement costs of all items would be large but could possibly be done in stages, membership brochures and forms being high priority, jewelry and clothing coming at a later time. Based on the reported sales at previous national conventions, it seems we carry a large inventory. However, this does not just effect the national level as many state courts have their own CDA stores. They too would need to redesign their merchandise and write-off the cost of current inventory. Although the final decision should not be based solely on costs, it is part of the equation.

The fifth area of study is consideration of timing the change; should there be required milestones first? The name change should be decided once we give the courts outside of the Americas a chance to see if they are going to survive. We should allow the courts time to show if and how they are going to grow and contribute to our Order. Are these courts going to encourage growth of other courts in their areas or are they going to be the only court in the area. Are these courts going to come and be a part of our conventions? Have we received progress reports from the existing courts? How are they doing? We are all very happy we have courts outside of the Americas but we have not had time to see if they are happy to be part of us; if they will continue to be a part of us.

Regarding the bylaws, the courts that could pay individual dues would not need a separate section in the bylaws. They could be treated as local courts. However, for "world" courts that would not be able to pay individual dues to CDA, there should be a separate section in the bylaws. We had two possible names for them "Sister Courts" or "Mission Courts." These are courts in countries or areas where there is need. The ladies of the parish could be organized as Catholic Daughters and could then go out and help those in need in their parish and community like the courts in the USA. Because of the need in these countries, we do not feel they can pay individual dues but rather should put any money they make or have back into helping the people in their area. It would be the "Teach a man to fish" idea. We also felt that it will probably be necessary to help them establish some sort of way to make money so that they can help the less fortunate. This should be a one-time effort where we would help them get started. This money could come from the 5% of our national dues that is set aside for charity. Their structure will be the same as the local courts. They will meet monthly and they will have the same officers. If we find in the future that this structure or these officers don't work, there may need to be a change but at this point, we recommend keeping the same structure. The duties of the officers may be a little different but again we will have to wait to determine if that is necessary. If there are dues, we

could have dues of \$25 or \$30 per year per court, that would be paid by a sponsor—either an individual, a group of people, or a court. There are some countries that do not allow money to be sent out of the country for such things as dues and for courts like this, we do not see us assessing dues when the needs of the people in their country are so great. In effect, this would be “Quality of Life” work, helping those in need in other countries. World courts would need to be treated like Territorial courts since there would be no state court? A few new questions arose:

1. Would this require an addition to the National Board of a National Director to oversee them? That is a discussion for the National Board; do they want to consider an addition of another Director to help, someone assigned to the “mission” or “sister” courts?
2. Who would oversee the financial review?
3. How might the maintenance of records be different since in some countries home addresses, phone numbers etc. may not be something that is as cut and dry as here in the States? Would this be covered under the duties of the officers?
4. Would the court be required to develop a budget?
5. What are the banking rules, would a court be able to open an account to hold money sent or raised by the court? If not, who or what entity would have access and control of those funds?
6. Would they need to develop a budget? Should it be required?

The next area of study had to do with establishing courts outside the USA; will they be under the umbrella of the 501 (C) 3 status? What are the legal requirements in establishing an organization? Primarily, we felt these questions would have to be addressed one court at a time as each country would have their own laws/rules. We are hopeful the local diocese would be able to help us navigate the laws of the area. As for the language barrier, most of our literature is currently available in both English and Spanish. It does seem to be absolutely necessary for the ladies to be able to have information in writing in a language they can read and understand. If there is a need to translate to other languages, there are companies that offer this service. The cost of translating materials into Spanish at this point is 16 cents per word. The cost can be up to 25 cents per word. We would assume the cost of other languages is similar. Or perhaps we might have a member willing to do translations.

Finally, we thought the question of JCDA should be addressed as well. Regardless of the name change, has consideration been made for how we will handle a request to establish JCDA in relation to one of our “World Courts?” Are we prepared? There could be additional legal questions as well as cultural questions. A plan should be established as to how this will be researched if and when the question arises.

As you can see, changing the name of our organization raises many questions. The decision will require analysis from many angles. Sometimes we have a tendency to focus only on the financial impact. Granted, this is a consideration we cannot ignore. However, must not forget our mission. Will a change of name further our mission to serve the poor, help those in need, be Christ’s hands and feet? Our next and final report will reflect the views of the entire team on all areas of study.

Thank you for allowing us to research this question on behalf of all members. May the Holy Spirit continue to guide us in our work.