



**Knights of
Columbus®**

Affiliate Member Initiative Guidebook

Pilot Phase 2 Edition

January, 2022
U.S. Councils Only

The guidance in this edition of the *Affiliate Member Initiative Guidebook* supersedes any previous editions.

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Introduction

The Affiliate Member Initiative (AMI) recognizes that some members, who share our values and support our mission, are unable to remain active in their local councils. This may be due to poor health, financial stress, family problems, lack of transportation, medical concerns or many other reasons.

The AMI allows these men to be designated as Affiliate members and removed from their local council rosters. The Supreme and State Councils will then engage Affiliate members by keeping them informed of major initiatives and giving them opportunities for volunteer service and charitable contributions.

The net result is that local councils will be able to devote more time to volunteer service and more funds to charitable causes. Council leaders will be able to give greater attention to active members and prospects. The AMI clearly benefits members and councils alike.

This guidebook contains the simple procedures that councils and district deputies must follow to submit lists of members recommended for designation as Affiliate members.

Participating Financial Secretaries, Grand Knights, and District Deputies will be asked to complete a short survey after their lists have been processed by the Supreme Council. This important feedback will be instrumental to the Affiliate Member Initiative.

Questions can be asked by email to [**affiliate@kofc.org**](mailto:affiliate@kofc.org) or phone at **(203) 752-4270**.

Procedures

NOTE: Only councils with a Financial Secretary and Grand Knight may designate members for Affiliate status.

Section 1: Affiliate Member Eligibility

- Members exempted from dues may not be designated for Affiliate status. Such members include Honorary Life members, Priests, and members with an exemption waiver.
- Inactive Insurance (designated as “N” under member type) members may not be designated for Affiliate status.
- Members who ask to withdraw from the Order may not be designated for Affiliate status. The normal withdrawal process must be followed for these members.
- Other members may be designated for Affiliate status if they have not responded to council engagement efforts for the most recent 18 months or longer. **Specifically, all of the following engagement methods must have been attempted and failed:**
 - Regular dues notices were sent, and dues were not paid, and
 - Emails were sent and ignored or bounced, and
 - Postal mail was sent and ignored or returned undeliverable, and
 - Phone calls were made and ignored or number not in service, and
 - The member has not been seen at Mass, meetings, or events

Eligibility Exceptions for Military and College Councils

- Military councils may list members who transfer duty stations without arranging to join a local council at their new post, so long as the member has not expressed interest in remaining in his current military council. It is not necessary to wait for 18 months of non-engagement with these members.
- College councils may list members who graduate and leave campus without arranging to join a local council in their new location, so long as the member has not expressed interest in remaining in his current college council. It is not necessary to wait for 18 months of non-engagement with these members.

Section 2: Affiliate Member Designation Process

FINANCIAL SECRETARY PROCEDURES:

1. The Financial Secretary creates a list of eligible members to be recommended for designation as Affiliate Members. The following procedure is recommended:
 - a. Download a report of council members using the Data Extract Tool in Member Management (Please refer to Figure I)
 - i. Log on to Officers Online
 - ii. Click on the gold Member Management icon

- iii. Click on the “Print Center – MM” button on the top right of the page (Please refer to Figure II)
- iv. Select the “Data Extract Tool” from the menu on the left side of the page
- v. Select “Billing Info” from the drop-down menu
- vi. Click the “Select All” buttons under the sections for “General Contacts”, “Primary Address Information”, and “Billing Information” (Please refer to Figure III)
- vii. Click OK when the prompt appears
- viii. Then press the “Get Extract” button in the bottom right-hand corner of the page. It may take several minutes before the data is delivered. Please be patient (Please refer to Figures IV and V)
- ix. Open the spreadsheet that is downloaded by the system
- x. Use this spreadsheet to create your list of recommended Affiliate Members following the procedure in step 1.b. below.

NOTE: *If your council does not use the Supreme Council’s Member Billing application to record dues payments, the “Council Tentative Affiliate List” must still be submitted as an Excel file. Please make sure that at least the following data elements are included for each member: Members Full Name (including Prefix and Suffix), Membership Number, Member Type, Member Class, Contact Information (Phone Number, Email Address, Mailing Address), Dues Paid Through Date and Outstanding Balance.*

- b. Refine your list by deleting members who are current, or only one year behind, on their dues, as follows:
 - i. Place your cursor on the letter(s) at the top of column (AI) “Dues Assessment Balance” and right click once to highlight the column (Please refer to Figure VI)
 - ii. Left click on the “Sort & Filter” button on top of the page and select “Sort Largest to Smallest” (Please refer to Figure VII)
 - iii. When the pop-up box appears click “Expand the selection” and press the “sort” button (Please refer to Figure VIII)
 - iv. Members with the highest dues’ balances will now be at the top of the column (Please refer to Figure IX)
 - v. Scroll down the column until you arrive at a dollar amount for 18 months of dues or more
 - vi. Highlight all rows below that amount and then right click your mouse and press “delete” (Please refer to Figure X)
 - vii. The remaining rows constitute your tentative council Affiliate Member designation list (Please refer to Figure XI)
 - viii. To save this list, click on the “File” button at the top left of the page
 - ix. Select “save as” from the drop-down menu

- x. Change the default format from “CSV” to “Excel Workbook” by clicking the arrow next to the save button and selecting “Excel Workbook .xlsx”
- xi. Save your file as “Council XXXX Tentative Affiliate List”
- c. Send the list of tentative designated members to the Grand Knight (Please refer to Figure XII)
- d. For subsequent member billing cycles, use the interim procedures provided in Appendix B.

GRAND KNIGHT AND TRUSTEES PROCEDURES:

2. The Grand Knight, along with the Trustees and/or other knowledgeable leaders, shall review the tentative list and remove the names of members for whom extenuating circumstances apply. Extenuating circumstances may include, but are not limited to the following:
 - Charter membership
 - Military deployment
 - College / University / Seminary attendance
 - Approved exemptions
 - Financial hardship, job loss
 - Medical hardship, convalescent home, or hospice care
 - Members who can no longer participate in council activities but want to retain their council association
- a. The Grand Knight and his assistants shall review every name on the tentative list and make every effort to determine if extenuating circumstances exist
 - i. To remove a member from the list supplied by the Financial Secretary, place your cursor on the number of the row on the left side of the page, left click once to highlight the row then right click the mouse and press “delete”
 - ii. After each removal click “file” on the top left of the page and then click “save” from the drop-down menu
 - iii. When all members with extenuating circumstances have been removed, click “file” on the top left of the page and then click “save as” from the drop-down menu.
 - iv. Be sure the format is Excel Workbook (.xlsx”) and then save your file as “Council XXXX Affiliate Recommendation List”
- b. Online resources are available to help the Grand Knight and his assistants in their evaluation. These are particularly useful when making decisions about members who are unknown to the reviewers. You can see the member’s degree status, age, parish, years of continuous service, proposer’s name, clergy status, and more. This information may influence a decision to not recommend for Affiliate designation someone of advanced age or someone soon to be designated as Honorary Life Member. It may also lead to contacting the member’s proposer to learn more about the member’s situation.

- i. Using the Grand Knight's access to Officers Online. Go to the Member Management tool as described in the Financial Secretary's procedures. Select the Data Extract Tool under the Print Center button choices.
 1. Select "Frat & Pers'l Info" from the drop-down menu (Please refer to Figure XIII)
 2. Press the "Select All" button under "Fraternal & Personal Information"
 3. Press the "Get Extract" button at the bottom of the page
 4. Open and save the report that is delivered. It may take several minutes to arrive.
- ii. Another option is to download a council roster from Officers Online.
 1. The Grand Knight shall login to Officers Online
 2. Scroll down the page, enter your council number in the oval box, and press "GO"
 3. Click on the "Reports" tab (Please refer to Figure XIV)
 4. Click on the PDF or Excel icon to the right of the "Membership Roster" report
 5. Open and save this file for your reference
- iii. A third option is to do individual Member Searches using Member Management
 1. The Grand Knight shall login to Officers Online
 2. Scroll down the page, enter your council number in the oval box, and press "GO"
 3. Click on the "Member Management" icon
 4. Under Required Criteria, enter the last name or member number and press the "Search" button (Please refer to Figure XV)
 5. Click on the member you want to review
 6. Use the menu on the left of the page to view different information
- c. Upon completing his fraternal review and revising the list, the Grand Knight submits the final list to the District Deputy for review and approval.
- d. The Grand Knight attaches the "Council XXXX Affiliate Recommendation List" file to an email with the following attestation (Please refer to Figure XVI):

"The Grand Knight and Trustees attest that the approved criteria were satisfied, and extenuating circumstances were considered, for all members listed for designation as Affiliate members. The criteria, defined by the Board of Directors, are found in the Affiliate Member Initiative Guidebook."

- e. The Grand Knight sends this email to the District Deputy with a copy to the State Deputy.
- f. No lists will be accepted without the Grand Knight attestation.

DISTRICT DEPUTY PROCEDURES:

3. Within 10 days of receiving the council's list, the District Deputy must complete the following actions:
 - a. The District Deputy will review the list with the Grand Knight and satisfy himself that the criteria were equitably and fairly applied for all listed members, and that extenuating circumstances were considered.
 - b. The District Deputy is not expected to personally verify the circumstances of each listed member.
 - c. Upon approving the list, the District Deputy shall electronically submit it to the Membership Records Office at affiliate@kofc.org with copies to the GK, FS, and State Deputy and with the following attestation (Please refer to Figure XVII):

“The Grand Knight, Trustees, and District Deputy attest that the approved criteria were satisfied, and extenuating circumstances were considered, for all members listed for designation as Affiliate members. The criteria, defined by the Board of Directors, are found in the Affiliate Member Initiative Guidebook.”

- d. If the District Deputy determines that the criteria were not satisfied, or that extenuating circumstances were not adequately considered, he shall return the list to the Grand Knight for corrections along with a written explanation, with a copy to the State Deputy.
- e. If a council does not have a District Deputy, the State Deputy, or his appointed designee, will complete these actions.

Affiliate Membership Assistance:

English	(203) 752-4270	Affiliate@kofc.org
Spanish	(203) 752-4270 Option #4	Affiliate@kofc.org

Appendix A

FIGURES

NOTE: Fictitious information was used to create the sample spreadsheets in this book.

Figure I

KNIGHTS OF COLUMBUS OFFICERS ONLINE

CHANGE PASSWORD LOGOUT
LANGUAGE: ENGLISH FAQ

UPDATE YOUR PROFILE

Officers Online

Grand Knight

Urgent Messages

The following are the various reports for 139th Annual Meeting of the Supreme Council that is held August 3-4; along with the Proceedings from the 2020 Supreme Council Meeting.

1. Annual Report of the Supreme Secretary – Book 1
2. Annual Report of the Supreme Secretary – Book 2
3. Annual Report of the Supreme Secretary – Book 3
4. Annual Report of the Supreme Treasurer
5. Annual Report of the Supreme Advocate
6. Annual Report of the Medical Director
7. Committee Appointments
8. Officers and Representatives
9. Resolutions
10. Proceeding – 2020 Supreme Council Meeting
11. Report of the Committee on Laws and Resolutions
12. Substitute Resolutions and Board Resolutions

Council Officers & Service Program Personnel Changes
For a member to be compliant with the Office of Youth Protection, he must have an email in his Primary Email filed on his General Information screen in Member Management, to be assigned to one of the following positions: Grand Knight, Program Director, Community Director or Family Director.

IMPORTANT NOTICE ON IMPORT FEES AND SHIPPING:
We have opened Knights Gear Canada to serve our Canadian Councils! We strongly recommend that you place all Canadian orders with KnightsGear.CA to avoid US brokerage fees, taxes and duties that are due upon delivery. KnightsGear.com is a US company and the total price paid on the website is in USD and does not include any shipping or taxes import fees. Should you choose to order from KnightsGear.com in the US please note that ALL SALES ARE FINAL and no refunds will be given even for abandoned or refused items. If there are items you are interested in purchasing from KnightsGear Canada that are with not on the site – please email and we will work to get you what you need.
[KnightsGear Canada Item Inquiry](#)

Supporting Applications

Officers Desk Reference Office Of Youth Protection Home Corporations **Member Management** By Laws Online Knights Gear Supplies Online Canadian Supplies Online

Membership Reports Forms Publications Prospect Candidate

Awards Progress Council Membership

Figure II

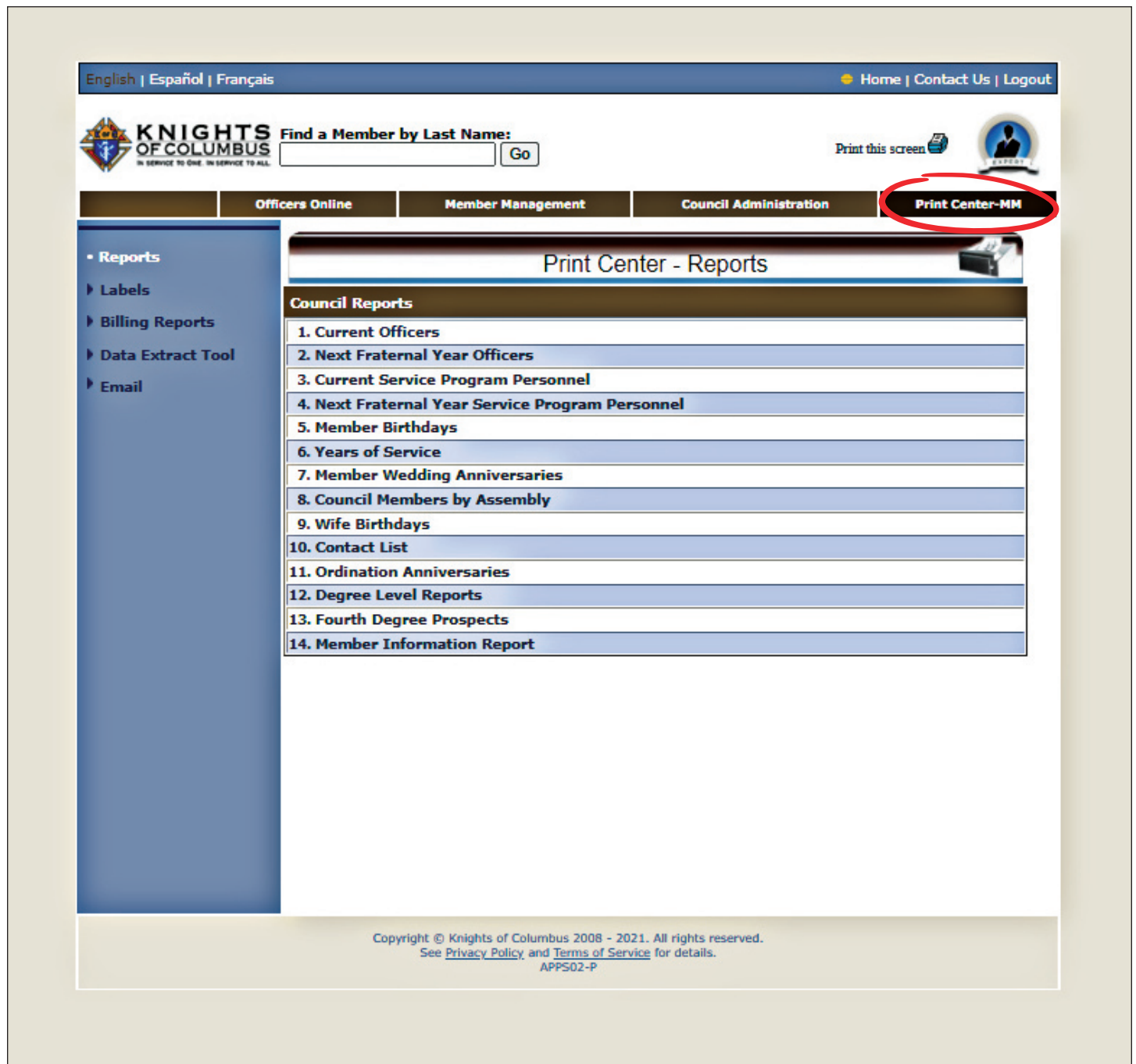





Figure III


English | Español | Français
Home | Contact Us | Logout


KNIGHTS OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

Find a Member by Last Name:

Print this screen



Officers Online
Member Management
Council Administration
Print Center-MM

Print Center - Data Extract Tool


Data Extract for Council:
Select the member records to be extracted:

☒ Active Members
☐ Former Members

The following appear on every data extract:

☒ Prefix
☒ Last Name
☒ First Name
☒ Suffix
☒ Middle Name
☒ Membership Number

Contact Information:

General Contacts:

☒ Residence Phone
☒ Seasonal Phone
☒ Residence Phone Ext
☒ Seasonal Phone Ext
☒ Business Phone
☒ Primary Email
☒ Business Phone Ext
☒ Secondary Email
☒ Fax Number
☒ Tertiary Email
☒ Cell Phone

Primary Address Information:

☒ Address Line 1
☒ State/Province
☒ Address Line 2
☒ Postal Code
☒ City
☒ Country


Secondary Address Information:

☐ Address Line 1 (Secondary)
☐ State/Province (Secondary)
☐ Address Line 2 (Secondary)
☐ Postal Code (Secondary)
☐ City (Secondary)
☐ Country (Secondary)

Billing Information:

☒ Billing Sub Class
☒ Dues Paid Through
☒ Billing Status
☒ Dues Assessment Balance
☒ Billing Status Date
☒ Initiation Fee Balance
☒ Send Bill?
☒ Special Assessment Balance
☒ Assess?
☒ Misc Assessment Balance
☒ Member Class
☒ Delivery Preference
☒ Exemption
☒ Language Preference
☒ Assembly Number

English | Español | Français



KNIGHTS OF COLUMBUS

IN SERVICE TO ONE. IN SERVICE TO ALL.

Reports

Labels

Billing Reports

Data Extract Tool

Contact Info

Frat & Pers'l Info


Billing Info

Member Interests

Website Support

Email

Contact Us | Logout



Print Center-MM

OK

Cancel

The following appear on every data extract:

☒ Prefix

☒ Last Name

☒ First Name

☒ Suffix

☒ Middle Name

☒ Membership Number

Contact Information:

General Contacts:

Select All

Unselect All

☒ Residence Phone

☒ Seasonal Phone

☒ Residence Phone Ext

☒ Seasonal Phone Ext

☒ Business Phone

☒ Primary Email

☒ Business Phone Ext

☒ Secondary Email

☒ Fax Number

☒ Tertiary Email

☒ Cell Phone

Primary Address Information:

Select All

Unselect All

☒ Address Line 1

☒ State/Province

☒ Address Line 2

☒ Postal Code

☒ City

☒ Country

Secondary Address Information:

Select All

Unselect All

☐ Address Line 1 (Secondary)

☐ State/Province (Secondary)

☐ Address Line 2 (Secondary)

☐ Postal Code (Secondary)

☐ City (Secondary)

☐ Country (Secondary)

Billing Information:

Select All

Unselect All

☒ Billing Sub Class

☒ Dues Paid Through

☒ Billing Status

☒ Dues Assessment Balance

☒ Billing Status Date

☒ Initiation Fee Balance

☒ Send Bill?

☒ Special Assessment Balance

☒ Assess?

☒ Misc Assessment Balance

☒ Member Class

☒ Delivery Preference

☒ Exemption

☒ Language Preference

☒ Assembly Number

Get Extract

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APP02-0

Figure V

OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

Go

Print this screen

Officers Online Member Management Council Administration Print Center-MM

Reports
Labels
Billing Reports
Data Extract Tool
Contact Info
Frat & Pers'l Info
Billing Info
Member Interests
Website Support
Email

Print Center - Data Extract Tool

Data Extract for Council:

Select the member records to be extracted:

☒ Active Members ☐ Former Members

The following appear on every data extract:

<input checked="" type="checkbox"/> Prefix	<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Suffix
<input checked="" type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Membership Number

Contact Information:

☒ City ☒ Country

Secondary Address Information:

Select All Unselect All

<input type="checkbox"/> Address Line 1 (Secondary)	<input type="checkbox"/> State/Province (Secondary)
<input type="checkbox"/> Address Line 2 (Secondary)	<input type="checkbox"/> Postal Code (Secondary)
<input type="checkbox"/> City (Secondary)	<input type="checkbox"/> Country (Secondary)


Billing Information:

Select All Unselect All

<input checked="" type="checkbox"/> Billing Sub Class	<input checked="" type="checkbox"/> Dues Paid Through
<input checked="" type="checkbox"/> Billing Status	<input checked="" type="checkbox"/> Dues Assessment Balance
<input checked="" type="checkbox"/> Billing Status Date	<input checked="" type="checkbox"/> Initiation Fee Balance
<input checked="" type="checkbox"/> Send Bill?	<input checked="" type="checkbox"/> Special Assessment Balance
<input checked="" type="checkbox"/> Assess?	<input checked="" type="checkbox"/> Misc Assessment Balance
<input checked="" type="checkbox"/> Member Class	<input checked="" type="checkbox"/> Delivery Preference
<input checked="" type="checkbox"/> Exemption	<input checked="" type="checkbox"/> Language Preference
<input checked="" type="checkbox"/> Assembly Number	

Get Extract

Reporting Service



Processing your report please wait! 00:02

[Cancel](#)

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See [Privacy Policy](#) and [Terms of Service](#) for details.
APPS02-P

Figure VI

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Figure VII

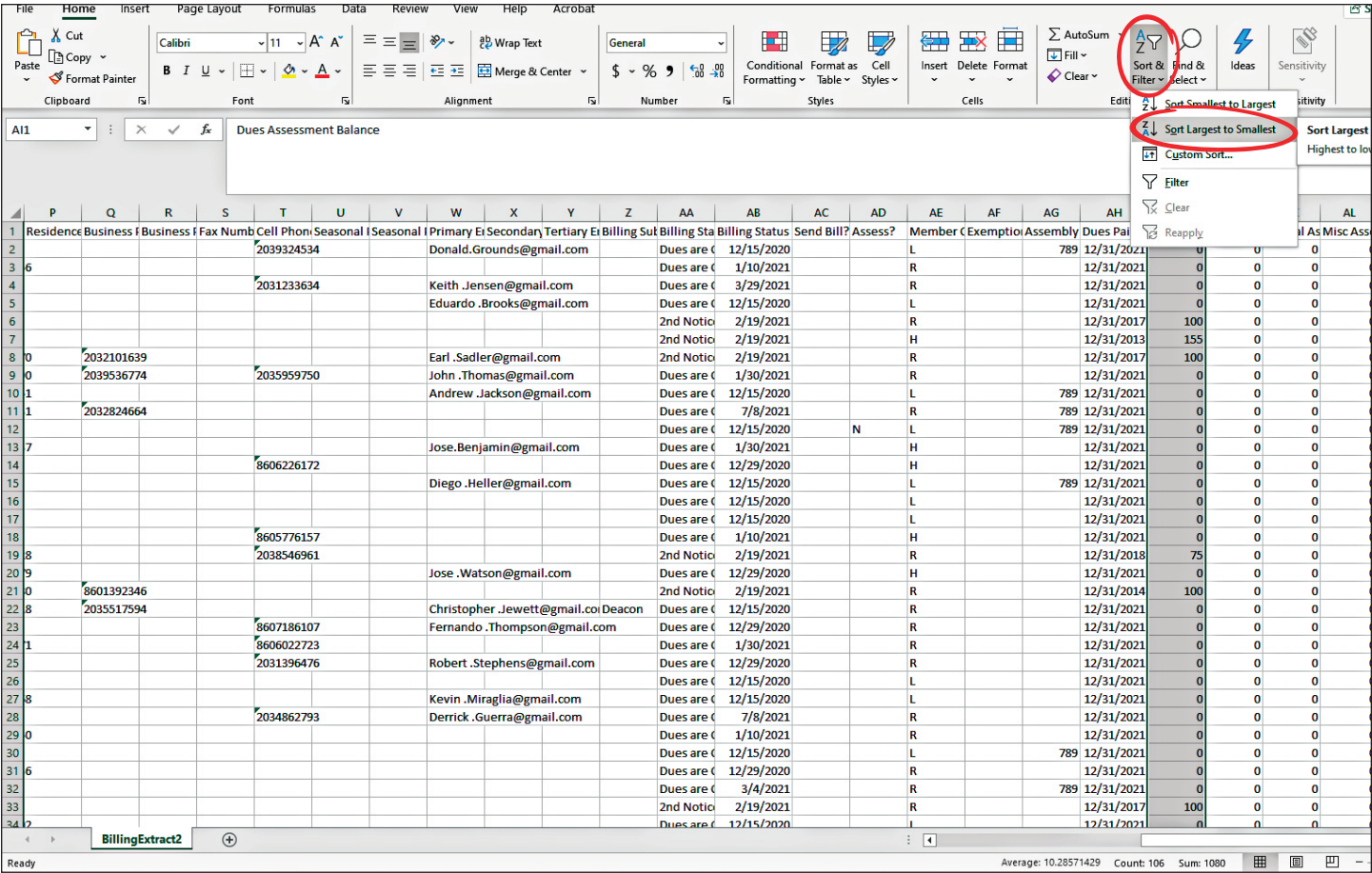


Figure VIII

Sort Warning

Microsoft Excel found data next to your selection. Since you have not selected this data, it will not be sorted.

What do you want to do?

☒ Expand the selection

☐ Continue with the current selection

Sort Cancel

Residence	Business	Business	Fax Numb	Cell Phon	Seasonal	Seasonal	Primary Et	Secondary	Tertiary Et	Billing St	Billing Sta	Billing Status	Send Bill?	Assess?	Member C	Exemptioi	Assembly	Dues Pal
2039324534							Donald.Grounds@gmail.com			Dues are	12/15/2020				L		789	12/31/2021
										Dues are	1/10/2021				R			0
2031233634							Keith.Jensen@gmail.com			Dues are	3/29/2021				R			0
							Eduardo.Brooks@gmail.com			Dues are	12/15/2020				L			0
										2nd Notic	2/19/2021				R			100
															H			155
2032101639							Earl			Dues are	12/31/2021				R			100
2039536774							John			Dues are	12/31/2021				R			0
							Andi								L		789	12/31/2021
2032824664															R			0
															L		789	12/31/2021
							Jose								H			0
															H			0
							8606226172			Dues are	12/31/2021				L		789	12/31/2021
							Diego.merene@gmail.com			Dues are	12/15/2020				L			0
										Dues are	12/15/2020				L			0
										Dues are	1/10/2021				H			0
										2nd Notic	2/19/2021				R			75
							Jose.Watson@gmail.com			Dues are	12/29/2020				H			0
										2nd Notic	2/19/2021				R			100
8601392346							Christopher.Jewett@gmail.com			Dues are	12/15/2020				R			0
2035517594							Fernando.Thompson@gmail.com			Dues are	12/29/2020				R			0
										Dues are	1/30/2021				R			0
							Robert.Stephens@gmail.com			Dues are	12/29/2020				L			0
										Dues are	12/15/2020				L			0
							Kevin.Miraglia@gmail.com			Dues are	12/15/2020				L			0
										Dues are	7/8/2021				R			0
							Derrick.Guerra@gmail.com			Dues are	1/10/2021				R			0
										Dues are	12/15/2020				L		789	12/31/2021
										Dues are	12/29/2020				R			0
										Dues are	3/4/2021				R		789	12/31/2021
										2nd Notic	2/19/2021				R			100
										Dues are	12/15/2020				L			0

BillingExtract2

Ready Average: 10.28571429 Count: 106 Sum: 1080

Figure IX

Dues Assessment Balance																									
P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM		
1	Residence Business f	Business f	Fax Numb	Cell Phon	Seasonal	Seasonal	Primary Et	Secondary	Tertiary Et	Billing Sut	Billing Sta	Billing Status	Send Bill?	Assess?	Member C	Exemption	Assembly	Dues Paid	Dues Assg	titiation	Special As	Misc Asse	Delivery F	Lar	
2	1	2038518356									2nd Notic	2/19/2021			R			12/31/201	175	0	0	0			
3											2nd Notic	2/19/2021			H			12/31/201	155	0	0	0			
4											2nd Notic	2/19/2021			R			12/31/201	150	0	0	0			
5											2nd Notic	2/19/2021			R			12/31/201	100	0	0	0			
6	0	2032101639					Earl .Sadler@gmail.com				2nd Notic	2/19/2021			R			12/31/201	100	0	0	0			
7	0	8601392346									2nd Notic	2/19/2021			R			12/31/201	100	0	0	0			
8											2nd Notic	2/19/2021			R			12/31/201	100	0	0	0			
9	8			2038546961							2nd Notic	2/19/2021			R			12/31/201	75	0	0	0	Mail		
10	1						Eric.Cooney@gmail.com				2nd Notic	2/19/2021			R		789	12/31/202	25	0	0	0			
11							Chester .Luu@gmail.com				2nd Notic	2/19/2021			R			12/31/202	25	-25	0	0			
12				2032028225			Lewis .Dodds@gmail.com				2nd Notic	2/19/2021			R			12/31/202	25	0	0	0			
13							Kevin.Secrist@gmail.com				2nd Notic	2/19/2021			R			12/31/202	25	0	0	0			
14				8603594970							2nd Notic	2/19/2021			R			12/31/202	25	0	0	0			
15				2039324534			Donald.Grounds@gmail.com				Dues are c	12/15/2020			L		789	12/31/202	0	0	0	0			
16	6										Dues are c	1/10/2021			R			12/31/202	0	0	0	0			
17				2031233634			Keith .Jensen@gmail.com				Dues are c	3/29/2021			R			12/31/202	0	0	0	0			
18							Eduardo .Brooks@gmail.com				Dues are c	12/15/2020			L			12/31/202	0	0	0	0			
19	0	2039536774		2035959750			John .Thomas@gmail.com				Dues are c	1/30/2021			R			12/31/202	0	0	0	0			
20	1						Andrew .Jackson@gmail.com				Dues are c	12/15/2020			L		789	12/31/202	0	0	0	0			
21	1	2032824664									Dues are c	7/8/2021			R		789	12/31/202	0	0	0	0			
22											Dues are c	12/15/2020	N		L		789	12/31/202	0	0	0	0	Mail		
23	7						Jose.Benjamin@gmail.com				Dues are c	1/30/2021			H			12/31/202	0	0	0	0			
24				8606226172							Dues are c	12/29/2020			H			12/31/202	0	0	0	0			
25							Diego .Heller@gmail.com				Dues are c	12/15/2020			L		789	12/31/202	0	0	0	0			
26											Dues are c	12/15/2020			L			12/31/202	0	0	0	0			
27											Dues are c	12/15/2020			L			12/31/202	0	0	0	0			
28				8605776157							Dues are c	1/10/2021			H			12/31/202	0	0	0	0	Mail		
29	9						Jose .Watson@gmail.com				Dues are c	12/29/2020			H			12/31/202	0	0	0	0			
30	8	2035517594					Christopher .Jewett@gmail.coi	Deacon			Dues are c	12/15/2020			R			12/31/202	0	0	0	0	Mail		
31				8607186107			Fernando .Thompson@gmail.com				Dues are c	12/29/2020			R			12/31/202	0	0	0	0			
32	1			8606022723							Dues are c	1/30/2021			R			12/31/202	0	0	0	0	Mail		
33				2031396476			Robert .Stephens@gmail.com				Dues are c	12/29/2020			R			12/31/202	0	0	0	0			
34											Dues are c	12/15/2020			L			12/31/202	0	0	0	0			

Figure X

File Home Insert Page Layout Formulas Data Review View Help Acrobat																								
Clipboard Font Alignment Number Styles Cells Editing Ideas Sensitivity																								
P10																								
P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN
1	Residence Business F	Business F	Fax Numb	Cell Phoni	Seasonal I	Seasonal I	Primary E	Secondary	Tertiary E	Billing Su	Billing Sta	Billing Status	Send Bill?	Assess?	Member C	Exemption	Assembly	Dues Paid T	Dues Asse	Initiation	Special As	Misc Asse	D	
2	1	2038518356									2nd Notic	2/19/2021			R			12/31/2014	175	0	0	0	0	
3											2nd Notic	2/19/2021			H			12/31/2013	155	0	0	0	0	
4											2nd Notic	2/19/2021			R			12/31/2015	150	0	0	0	0	
5											2nd Notic	2/19/2021			R			12/31/2017	100	0	0	0	0	
6	0	2032101639					Earl .Sadler@gmail.com				2nd Notic	2/19/2021			R			12/31/2017	100	0	0	0	0	
7	0	8601392346									2nd Notic	2/19/2021			R			12/31/2014	100	0	0	0	0	
8											2nd Notic	2/19/2021			R			12/31/2017	100	0	0	0	0	
9	8			2038546961							2nd Notic	2/19/2021			R			12/31/2018	75	0	0	0	0	N
							Eric.Cooney@gmail.com				2nd Notic	2/19/2021			R		789	12/31/2020	25	0	0	0	0	
							Chester .Luu@gmail.com				2nd Notic	2/19/2021			R			12/31/2020	25	-25	0	0	0	
							Lewis .Dodds@gmail.com				2nd Notic	2/19/2021			R			12/31/2020	25	0	0	0	0	
							Kevin.Secrist@gmail.com				2nd Notic	2/19/2021			R			12/31/2020	25	0	0	0	0	
											2nd Notic	2/19/2021			R			12/31/2021	25	0	0	0	0	
							Donald.Grounds@gmail.com				Dues are C	12/15/2020			L		789	12/31/2021	0	0	0	0	0	
											Dues are C	1/10/2021			R			12/31/2021	0	0	0	0	0	
							Keith .Jensen@gmail.com				Dues are C	3/29/2021			R			12/31/2021	0	0	0	0	0	
							Eduardo .Brooks@gmail.com				Dues are C	12/15/2020			L			12/31/2021	0	0	0	0	0	
							John .Thomas@gmail.com				Dues are C	1/30/2021			R			12/31/2021	0	0	0	0	0	
							Andrew .Jackson@gmail.com				Dues are C	12/15/2020			L		789	12/31/2021	0	0	0	0	0	
											Dues are C	7/8/2021			R		789	12/31/2021	0	0	0	0	0	
											Dues are C	12/15/2020	N		L		789	12/31/2021	0	0	0	0	0	N
							Jose.Benjamin@gmail.com				Dues are C	1/30/2021			H			12/31/2021	0	0	0	0	0	
											Dues are C	12/29/2020			H			12/31/2021	0	0	0	0	0	
							Diego .Heller@gmail.com				Dues are C	12/15/2020			L		789	12/31/2021	0	0	0	0	0	
											Dues are C	12/15/2020			L			12/31/2021	0	0	0	0	0	
											Dues are C	12/15/2020			L			12/31/2021	0	0	0	0	0	
											Dues are C	1/10/2021			H			12/31/2021	0	0	0	0	0	N
							Jose .Watson@gmail.com				Dues are C	12/29/2020			H			12/31/2021	0	0	0	0	0	
							Christopher .Jewett@gmail.coi	Deacon			Dues are C	12/15/2020			R			12/31/2021	0	0	0	0	0	N
31	1			8607186107			Fernando .Thompson@gmail.com				Dues are C	12/29/2020			R			12/31/2021	0	0	0	0	0	
32				8606022723							Dues are C	1/30/2021			R			12/31/2021	0	0	0	0	0	N
33				2031396476			Robert .Stephens@gmail.com				Dues are C	12/29/2020			R			12/31/2021	0	0	0	0	0	
34											Dues are C	12/15/2020			L			12/31/2021	0	0	0	0	0	

Figure XI

File Home Insert Page Layout Formulas Data Review View Help Acrobat														Share Co																			
Clipboard		Font		Alignment		Number		Styles		Cells		Editing		Ideas		Sensitivity																	
Paste		Calibri 11 A		General				Conditional Formatting		Format as Table		Cell Styles		Insert		Delete		Format		AutoSum		Sort & Filter		Find & Select		Ideas		Sensitivity					
Format Painter		B I U		Merge & Center		\$ %														Fill		Clear											
AI1		Dues Assessment Balance																															
	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM									
1	Residence Business f	Business f	Fax Numb	Cell Phon	Seasonal I	Seasonal I	Primary E	Secondary	Tertiary E	Billing Sub	Billing Sta	Billing Status	Send Bill?	Assess?	Member C	Exemption	Assembly	Dues Paid T	Dues Assoc	Initiation	Special As	Misc Asse	Delivery F	La									
2	1	2038518356										2nd Notic	2/19/2021			R			12/31/2014	175	0	0	0										
3												2nd Notic	2/19/2021			H			12/31/2013	155	0	0	0										
4												2nd Notic	2/19/2021			R			12/31/2015	150	0	0	0										
5												2nd Notic	2/19/2021			R			12/31/2017	100	0	0	0										
6	0	2032101639					Earl .Sadler@gmail.com					2nd Notic	2/19/2021			R			12/31/2017	100	0	0	0										
7	0	8601392346										2nd Notic	2/19/2021			R			12/31/2014	100	0	0	0										
8												2nd Notic	2/19/2021			R			12/31/2017	100	0	0	0										
9	8				2038546961							2nd Notic	2/19/2021			R			12/31/2018	75	0	0	0	Mail									
10																																	
11																																	
12																																	
13																																	

Figure XII – Financial Secretary Email to Grand Knight

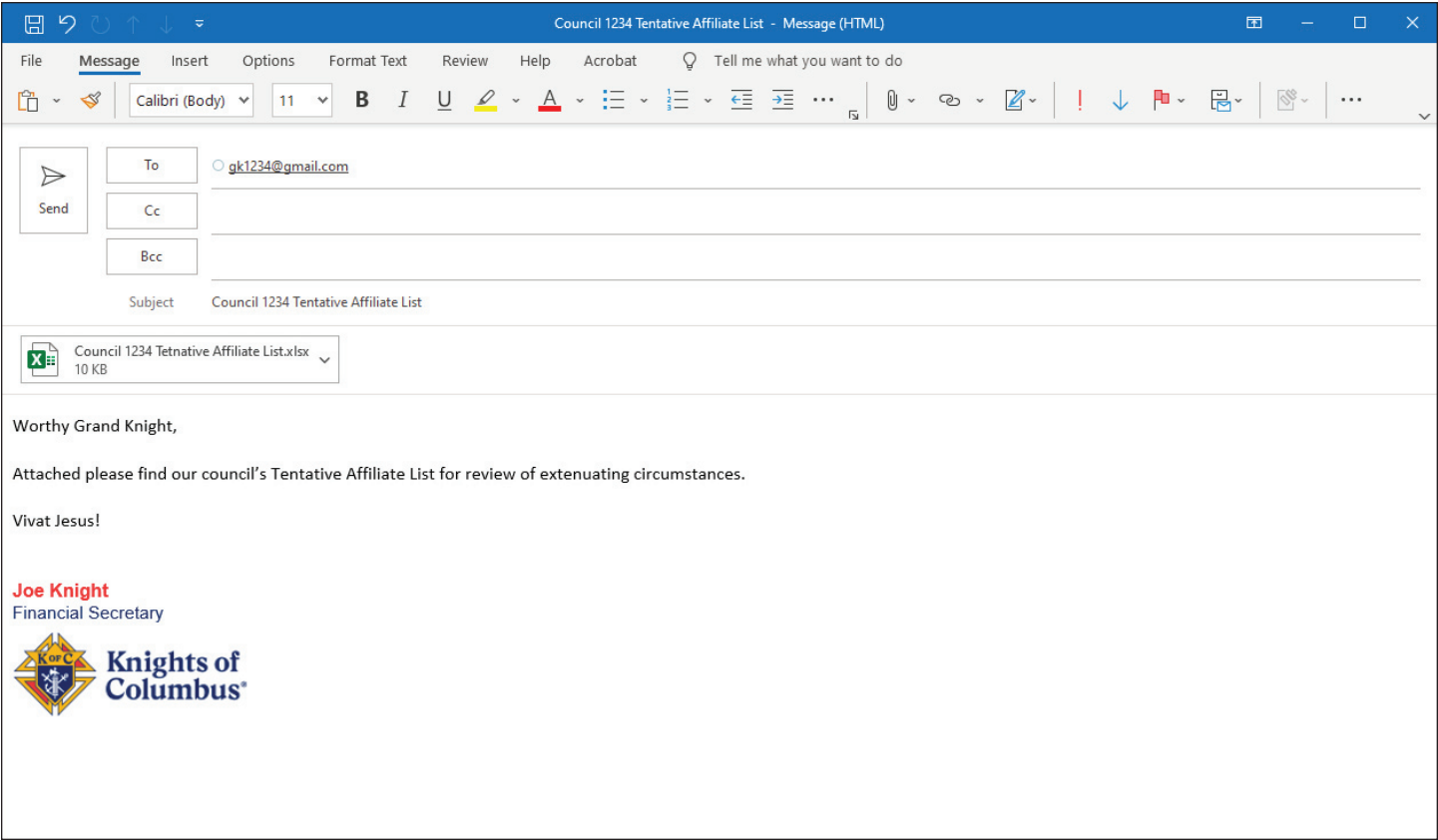





Figure XIII


English | Español | Français
Home | Contact Us | Logout


KNIGHTS OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

Find a Member by Last Name:

Print this screen



Officers Online
Member Management
Council Administration
Print Center-MM

Print Center - Data Extract Tool


Data Extract for Council:
Select the member records to be extracted:
☒ Active Members
☐ Former Members

The following appear on every data extract:
☒ Prefix
☒ Last Name
☒ First Name
☒ Suffix
☒ Middle Name
☒ Membership Number

Contact Information:
General Contacts:

☒ Residence Phone
☒ Seasonal Phone
☒ Residence Phone Ext
☒ Seasonal Phone Ext
☒ Business Phone
☒ Primary Email
☒ Business Phone Ext
☒ Secondary Email
☒ Fax Number
☒ Tertiary Email
☒ Cell Phone

Primary Address Information:

☒ Address Line 1
☒ State/Province
☒ Address Line 2
☒ Postal Code
☒ City
☒ Country

Secondary Address Information:

☐ Address Line 1 (Secondary)
☐ State/Province (Secondary)
☐ Address Line 2 (Secondary)
☐ Postal Code (Secondary)
☐ City (Secondary)
☐ Country (Secondary)

Fraternal & Personal Information:

☒ Member Type
☒ Date of Death
☒ Member Class
☒ Nickname
☒ 1st Degree Date
☒ Marital Status
☒ 2nd Degree Date
☒ Spouse First Name
☒ 3rd Degree Date
☒ Spouse Last Name
☒ 4th Degree Date
☒ Spouse Birth Date
☒ Council Re-entry Date
☒ Spouse Date of Death
☒ Years of Continuous Service - Council
☒ Wedding Anniversary Date
☒ Proposer Membership Number
☒ Fraternal Suffix
☒ Proposer Name
☒ Letter Salutation
☒ Assembly Number
☒ Parish
☒ 4th Degree Status
☒ Ordination Date

Reports
Labels
Billing Reports
• Data Extract Tool
• Contact Info
• **Frat & Pers'l Info**
Billing Info
Member Interests
Website Support
Email

Figure XIV

[7. Committee Appointments](#)
[8. Officers and Representatives](#)
[9. Resolutions](#)
[10. Proceeding – 2020 Supreme Council Meeting](#)
[11. Report of the Committee on Laws and Resolutions](#)
[12. Substitute Resolutions and Board Resolutions](#)

Council Officers & Service Program Personnel Changes

For a member to be compliant with the Office of Youth Protection, he must have an email in his Primary Email filed on his General Information screen in Member Management, to be assigned to one of the following positions: Grand Knight, Program Director, Community Director or Family Director.

IMPORTANT NOTICE ON IMPORT FEES AND SHIPPING:

We have opened Knights Gear Canada to serve our Canadian Councils! We strongly recommend that you place all Canadian orders with KnightsGear.CA to avoid US brokerage fees, taxes and duties that are due upon delivery. KnightsGear.com is a US company and the total price paid on the website is in USD and does not include any shipping or taxes import fees. Should you choose to order from [KnightsGear.com](#) in the US please note that ALL SALES ARE FINAL and no refunds will be given even for abandoned or refused items. If there are items you are interested in purchasing from KnightsGear Canada that are with not on the site – please email and we will work to get you what you need.

[KnightsGear Canada Item Inquiry](#)

New York > 74 > #2936 (Le Roy) >

Supporting Applications

Officers Desk Reference

Office Of Youth Protection

Home Corporations

Member Management

By Laws Online

Knights Gear

Supplies Online

Canadian Supplies Online


[Membership](#)
[Reports](#)
[Forms](#)
[Publications](#)
[Prospect](#)
[Candidate](#)

Search:

Report Name	Date	PDF	Excel
Membership Roster	8/17/2021		
Membership Roster - January	1/1/2021		
Membership Roster - July	7/1/2021		
Financial Statement	8/1/2021		
Safe Environment Member Status	8/17/2021		
Safe Environment Participation Rate Report	8/17/2021		
Council Billing Statement (Past)	7/30/2021		


Figure XV


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KNIGHTS OF COLUMBUS
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Find a Member by Last Name:

[Print this screen](#) 



Officers Online

Member Management

Council Administration

Print Center-MM

• Member Management

• Find a Member

▸ Search Results

▸ General Information

▸ Fraternal Information

▸ Personal Information

▸ Member Interests

▸ Contact Notes

▸ Change History

Member Management - Find A Member

Search Criteria

Display records for the following:

☒ Active Members ☐ Former Members

Required Criteria

Last Name: -or- Member #:

Search Tips

Copyright © Knights of Columbus 2008 - 2021. All rights reserved.
See [Privacy Policy](#) and [Terms of Service](#) for details.
APPS02-P

Figure XVI – Grand Knight Email to District Deputy

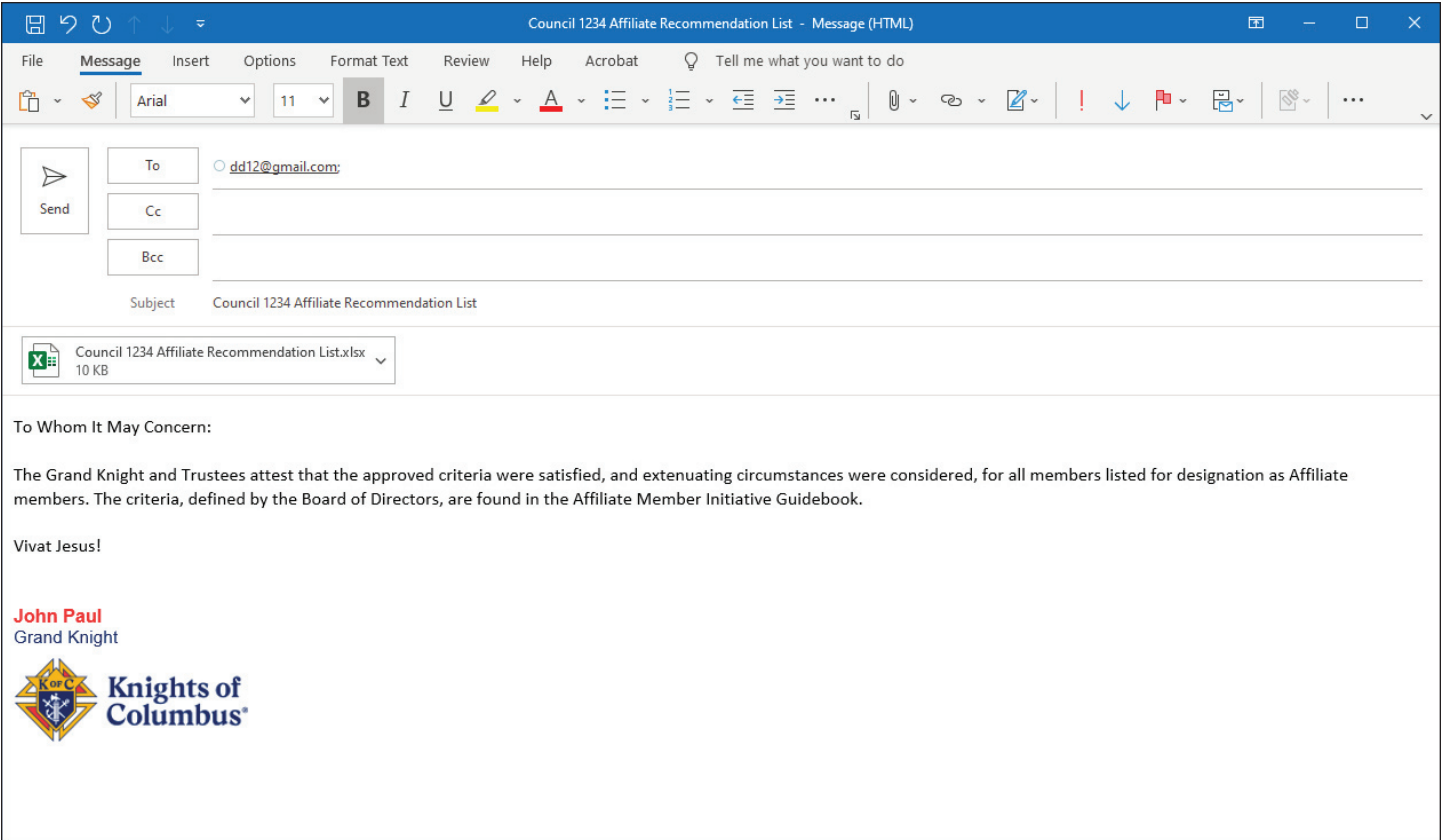
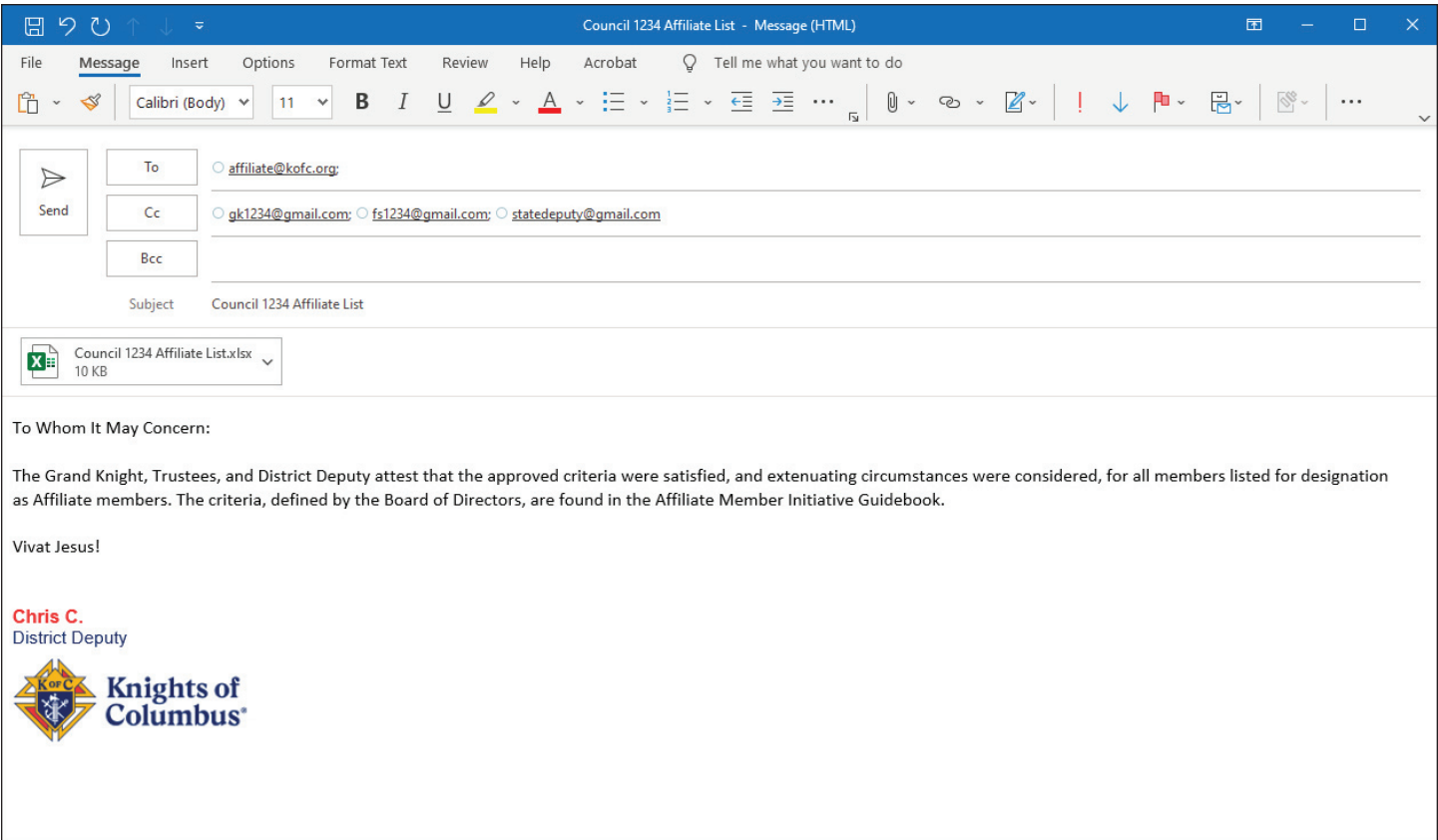


Figure XVII – District Deputy Email to Affiliate Mailbox



Appendix B

KNIGHTS OF COLUMBUS AFFILIATE MEMBER INITIATIVE Interim Member Billing Procedures

These revised billing procedures are needed because the AMI significantly changes the handling of members who are delinquent in their payment of dues.

Financial Secretaries should use the Member Management and Member Billing applications, located in the secure Officers Online area of www.kofc.org, to perform the tasks listed in this section.

1. The Financial Secretary forwards the membership bill “First Notice” 15 days before the billing period to each member.
2. If payment is not received in 30 days, the Financial Secretary will forward the membership bill “Second Notice”.
3. **If payment is not received within 30 days from the date the “Second Notice” was sent, do not update billing status to Knight Alert.**

The Financial Secretary will instead provide the names, addresses, telephone numbers, email address, amounts due, and proposer information for each member in arrears to an Engagement Committee that should include a Chairman and two additional members.

4. The Engagement Committee Chairman shall assign committee members to contact the members in arrears. Committee members should use various methods, including internet search engines, to locate members whose contact information is out of date.

If a member is found to be experiencing financial difficulty, the Engagement Committee Chairman should recommend to the Grand Knight and Trustees that forgiveness of dues or other suitable financial arrangements be made to assist this member.

If a member has disengaged himself from council activities or become dissatisfied with his Knights of Columbus membership, the committee member should remind the Brother of the many valuable benefits available to all members and the particular fraternal benefits of working with local council Brothers. A supply of membership benefit reference materials should be readily available for committee members to share as needed.

5. Within 30 days of receiving the list of members in arrears, the Engagement Committee Chairman shall submit to the Grand Knight and Trustees a report including the reasons for nonpayment and their recommended actions for each listed member.
6. Within 15 days of receiving the Engagement Committee report, the Grand Knight shall meet with the Financial Secretary and Trustees to decide on a course of action for each member. These actions may include, but are not limited to:

- Issuing a “Final Notice” to members who wish to remain in the council and gave no reason for nonpayment. *The Financial Secretary can regenerate another “Second Notice” from Member Billing to serve as this “Final Notice.”*
- Waiving the dues for members in financial distress.
- Reducing the dues or allowing alternate payment plans for members in financial distress.
- Processing the withdrawal of members who request to leave the Order.
- Processing members who meet the requirements for designation as Affiliate Members in the state division. **Lists of these members should be submitted through a council’s district deputy and received by the Supreme Council no later than April 30.**

7. No further billing actions are required.

NOTE: *Suspension transactions are reserved for Summary Suspension for Cause and Board actions.*

Appendix C

Affiliate Member Effect on Council Records

Upon listed members being designated as Affiliate Members by Supreme's Membership Records office, the following changes will be noted on council records:

1. On the next Council Billing Statement, councils will see the following transaction for each new Affiliate member:
 - i. For an Associate member:
ASSOCIATE TRANSFER TO AFFILIATE CLASS
INSTATE TRANSFER ASSOCIATE
 - ii. For an Insurance member:
INSURANCE TRANSFER TO AFFILIATE CLASS
INSTATE TRANSFER INSURANCE
2. On Officers Online:
 - i. Affiliate members will not be on the membership Roster that is updated weekly.
3. On Member Management and Member Billing applications:
 - i. Affiliate members will not be found when searching for Active or Former members on Find a Member screens.
 - ii. Affiliate members will not be found when searching in the members Transfers section under Member Information.
 - iii. Affiliate members will not be found when extracting data for Active or Former members on any Data Extract Tool.

