



**Knights of
Columbus®**

Affiliate Member Initiative Guidebook

Pilot Phase 2 Edition

April, 2022

Includes Revised Appendix B

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 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

The screenshot displays the 'Officers Online' web portal for the Knights of Columbus. At the top, the logo and name 'KNIGHTS OF COLUMBUS OFFICERS ONLINE' are visible, along with navigation links for 'CHANGE PASSWORD', 'LOGOUT', 'LANGUAGE: ENGLISH', and 'FAQ'. Below the header, a 'Grand Knight' button is present. The main content area is titled 'Urgent Messages' and contains a list of reports for the 139th Annual Meeting of the Supreme Council, including the Annual Report of the Supreme Secretary (Books 1-3), the Supreme Treasurer, Supreme Advocate, Medical Director, Committee Appointments, Officers and Representatives, Resolutions, and Proceedings. Below this, there is a section for 'Council Officers & Service Program Personnel Changes' and an 'IMPORTANT NOTICE ON IMPORT FEES AND SHIPPING' regarding Knights Gear Canada. A navigation bar at the bottom features several icons for different services: Officers Desk Reference, Office Of Youth Protection, Home Corporations, Member Management (circled in red), By Laws Online, Knights Gear, Supplies Online, and Canadian Supplies Online. A secondary navigation bar at the very bottom includes links for Membership, Reports, Forms, Publications, Prospect, Candidate, Awards Progress, and Council Membership.

Figure II

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS Find a Member by Last Name: Go

Print this screen

Officers Online Member Management Council Administration **Print Center-MM**

Print Center - Reports

Council Reports

1. Current Officers
2. Next Fraternal Year Officers
3. Current Service Program Personnel
4. Next Fraternal Year Service Program Personnel
5. Member Birthdays
6. Years of Service
7. Member Wedding Anniversaries
8. Council Members by Assembly
9. Wife Birthdays
10. Contact List
11. Ordination Anniversaries
12. Degree Level Reports
13. Fourth Degree Prospects
14. Member Information Report

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APPS02-P

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:



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:

<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:

General Contacts:

<input checked="" type="checkbox"/> Residence Phone	<input checked="" type="checkbox"/> Seasonal Phone
<input checked="" type="checkbox"/> Residence Phone Ext	<input checked="" type="checkbox"/> Seasonal Phone Ext
<input checked="" type="checkbox"/> Business Phone	<input checked="" type="checkbox"/> Primary Email
<input checked="" type="checkbox"/> Business Phone Ext	<input checked="" type="checkbox"/> Secondary Email
<input checked="" type="checkbox"/> Fax Number	<input checked="" type="checkbox"/> Tertiary Email
<input checked="" type="checkbox"/> Cell Phone	

Primary Address Information:

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

Secondary Address Information:

<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:

<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	

Figure IV

www.kofc.org says

By clicking 'OK' I certify that I am a member in good standing with the Knights of Columbus and will not copy, merge, disseminate, distribute, transmit or make available the enclosed reports to anyone not involved with the Knights of Columbus or to anyone for non-Knights of Columbus-related business and I will take the appropriate measures to protect the information. These materials are solely intended for the use of Knights of Columbus officers in the conduct of Knights of Columbus business. Unauthorized distribution or reproduction for non-Knights of Columbus business is strictly prohibited.

OK Cancel

The following appear on every data extract:

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

Contact Information:

General Contacts:

Select All Unselect All

<input checked="" type="checkbox"/> Residence Phone	<input checked="" type="checkbox"/> Seasonal Phone
<input checked="" type="checkbox"/> Residence Phone Ext	<input checked="" type="checkbox"/> Seasonal Phone Ext
<input checked="" type="checkbox"/> Business Phone	<input checked="" type="checkbox"/> Primary Email
<input checked="" type="checkbox"/> Business Phone Ext	<input checked="" type="checkbox"/> Secondary Email
<input checked="" type="checkbox"/> Fax Number	<input checked="" type="checkbox"/> Tertiary Email
<input checked="" type="checkbox"/> Cell Phone	

Primary Address Information:

Select All Unselect All

<input checked="" type="checkbox"/> Address Line 1	<input checked="" type="checkbox"/> State/Province
<input checked="" type="checkbox"/> Address Line 2	<input checked="" type="checkbox"/> Postal Code
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> 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

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AP0502-0

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

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

Reporting Service



Processing your report please wait! 00:02

[Cancel](#)

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

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APPS02-P

Figure VI

	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		
	Residence	Business	Business	Fax	Numb Cell	Phon	Seasonal	Seasonal	Primary	Secondary	Tertiary	Billing	Sub-Billing	Sta-Billing	Status	Send Bill?	Assess?	Member	Exemptio	Assembly	Dues Paid	Dues Assn	Special As	Misc	Assn	Delivery	Lang
3					201121014				Donald.Groumb@gmail.com			Dues are c	11/15/2020		L			789	12/31/202		0	0	0	0			
4					201121014				Keith.James@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
5					201121014				Edward.Brooks@gmail.com			Dues are c	1/10/2021		L						12/31/202	0	0	0	0		
6					201121014				Earl.Sadler@gmail.com			2nd Notic	1/10/2021		R						12/31/202	100	0	0	0		
7					201121014				John.Thomas@gmail.com			2nd Notic	1/10/2021		H						12/31/202	100	0	0	0		
8					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
9					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
10					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
11					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
12					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
13					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
14					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
15					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
16					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
17					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
18					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
19					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
20					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
21					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
22					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
23					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
24					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
25					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
26					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
27					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
28					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
29					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			
30					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		R						12/31/202	0	0	0	0		
31					201121014				Andrew.Jackson@gmail.com			Dues are c	1/10/2021		L			789	12/31/202		0	0	0	0			

Figure VII

The screenshot shows the Microsoft Excel interface with the 'Data' ribbon selected. The 'Sort & Filter' dropdown menu is open, and the 'Sort Largest to Smallest' option is highlighted. The spreadsheet displays a 'Dues Assessment Balance' table with the following columns: Resident, Business, Fee Number, Cell Phone, Seasonal, Primary, Secondary, Tertiary, Billing, Billing Status, Send Bill?, Assess?, Member, Exempt, Assembly, Dues Paid, and a final column for balance amounts.

Resident	Business	Fee Number	Cell Phone	Seasonal	Primary	Secondary	Tertiary	Billing	Billing Status	Send Bill?	Assess?	Member	Exempt	Assembly	Dues Paid			
		203324034			Donald.Grounds@gmail.com			Dues are c	12/15/2020			L		789	12/31/2021	0	0	0
		203323834			Keith.Jensen@gmail.com			Dues are c	3/10/2021			R		12/31/2021	0	0	0	0
					Eduardo.Brooks@gmail.com			Dues are c	12/15/2020			L		12/31/2021	0	0	0	0
								2nd Notic	2/18/2021			R		12/31/2021	300	0	0	0
								2nd Notic	3/19/2021			H		12/31/2021	155	0	0	0
		201218189			Earl.Sadler@gmail.com			2nd Notic	3/19/2021			R		12/31/2021	300	0	0	0
		201953679			John.Thomas@gmail.com			Dues are c	3/10/2021			R		12/31/2021	0	0	0	0
					Andrew.Jackson@gmail.com			Dues are c	12/15/2020			L		789	12/31/2021	0	0	0
		201202464						Dues are c	7/6/2021			R		789	12/31/2021	0	0	0
								Dues are c	12/15/2020			L		789	12/31/2021	0	0	0
					Jose.Benjamin@gmail.com			Dues are c	1/10/2021			H		12/31/2021	0	0	0	0
								Dues are c	12/29/2020			H		12/31/2021	0	0	0	0
					Diego.Hellan@gmail.com			Dues are c	12/15/2020			L		789	12/31/2021	0	0	0
								Dues are c	12/15/2020			L		12/31/2021	0	0	0	0
								Dues are c	12/15/2020			L		12/31/2021	0	0	0	0
								Dues are c	1/10/2021			H		12/31/2021	0	0	0	0
								2nd Notic	3/19/2021			R		12/31/2021	75	0	0	0
					Jose.Watson@gmail.com			Dues are c	12/29/2020			H		12/31/2021	0	0	0	0
								2nd Notic	2/18/2021			R		12/31/2021	300	0	0	0
		20182348			Christopher.Jewett@gmail.com	Deacon		Dues are c	12/15/2020			R		12/31/2021	0	0	0	0
		201512794			Fernando.Thompson@gmail.com			Dues are c	12/29/2020			R		12/31/2021	0	0	0	0
								Dues are c	1/10/2021			R		12/31/2021	0	0	0	0
					Robert.Stephens@gmail.com			Dues are c	12/29/2020			R		12/31/2021	0	0	0	0
								Dues are c	12/15/2020			L		12/31/2021	0	0	0	0
								Dues are c	12/15/2020			L		12/31/2021	0	0	0	0
					Kevin.Miraglia@gmail.com			Dues are c	7/6/2021			R		12/31/2021	0	0	0	0
		201481290			Derrick.Guerza@gmail.com			Dues are c	1/10/2021			R		12/31/2021	0	0	0	0
								Dues are c	12/15/2020			L		789	12/31/2021	0	0	0
								Dues are c	12/29/2020			R		12/31/2021	0	0	0	0
								Dues are c	3/4/2021			R		789	12/31/2021	0	0	0
								2nd Notic	2/18/2021			R		12/31/2021	300	0	0	0
								Dues are c	12/15/2020			L		12/31/2021	0	0	0	0

Figure VIII

The screenshot shows the Microsoft Excel interface with a spreadsheet titled 'Dues Assessment Balance'. A 'Sort Warning' dialog box is open, displaying the following text:

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

The 'Sort' button at the bottom of the dialog is circled in red. The background spreadsheet contains columns for 'Resident', 'Business', 'Fee Number', 'Cell Phone', 'Seasonal', 'Primary', 'Secondary', 'Tertiary', 'Billing', 'Status', 'Send Bill?', 'Assess?', 'Member', 'Exemption', 'Assembly', and 'Dues Paid'. The data rows include names like Donald Grounds, Keith Jensen, Eduardo Brooks, Earl, John, AND, Jose, Diego, Christopher Jewett, Fernando Thompson, Robert Stephens, Kevin Miraglia, and Derrick Guerra.

Figure XI

The screenshot shows an Excel spreadsheet titled "Dues Assessment Balance". The spreadsheet contains a table with the following columns: Residency, Business, Business I, Fee, Home, Cell, Photo, Seasonal I, Seasonal II, Primary, Secondary, Tertiary, Billing, Sub, Billing, Site, Billing, Status, Send, Bill?, Access?, Member, C, Exemption, Assembly, Dues, Paid?, Dues, Assessment, Special, As, Misc, Assn, Delivery, F, L, U.

The data rows are as follows:

Row	Residency	Business	Business I	Fee	Home	Cell	Photo	Seasonal I	Seasonal II	Primary	Secondary	Tertiary	Billing	Sub	Billing	Site	Billing	Status	Send	Bill?	Access?	Member	C	Exemption	Assembly	Dues	Paid?	Dues	Assessment	Special	As	Misc	Assn	Delivery	F	L	U
2				5038508506									2nd Notice	2/28/2021								R				12/31/2014		175	0	0	0	0	0	0	0	0	0
3													2nd Notice	2/28/2021								R				12/31/2013		155	0	0	0	0	0	0	0	0	
4													2nd Notice	2/28/2021								R				12/31/2013		150	0	0	0	0	0	0	0	0	
5													2nd Notice	2/28/2021								R				12/31/2017		100	0	0	0	0	0	0	0	0	
6										Earl Sacler@gmail.com			2nd Notice	2/28/2021								R				12/31/2017		100	0	0	0	0	0	0	0	0	
7													2nd Notice	2/28/2021								R				12/31/2014		100	0	0	0	0	0	0	0	0	
8													2nd Notice	2/28/2021								R				12/31/2017		100	0	0	0	0	0	0	0	0	
9													2nd Notice	2/28/2021								R				12/31/2018		75	0	0	0	0	0	0	0	Mail	

Figure XII – Financial Secretary Email to Grand Knight

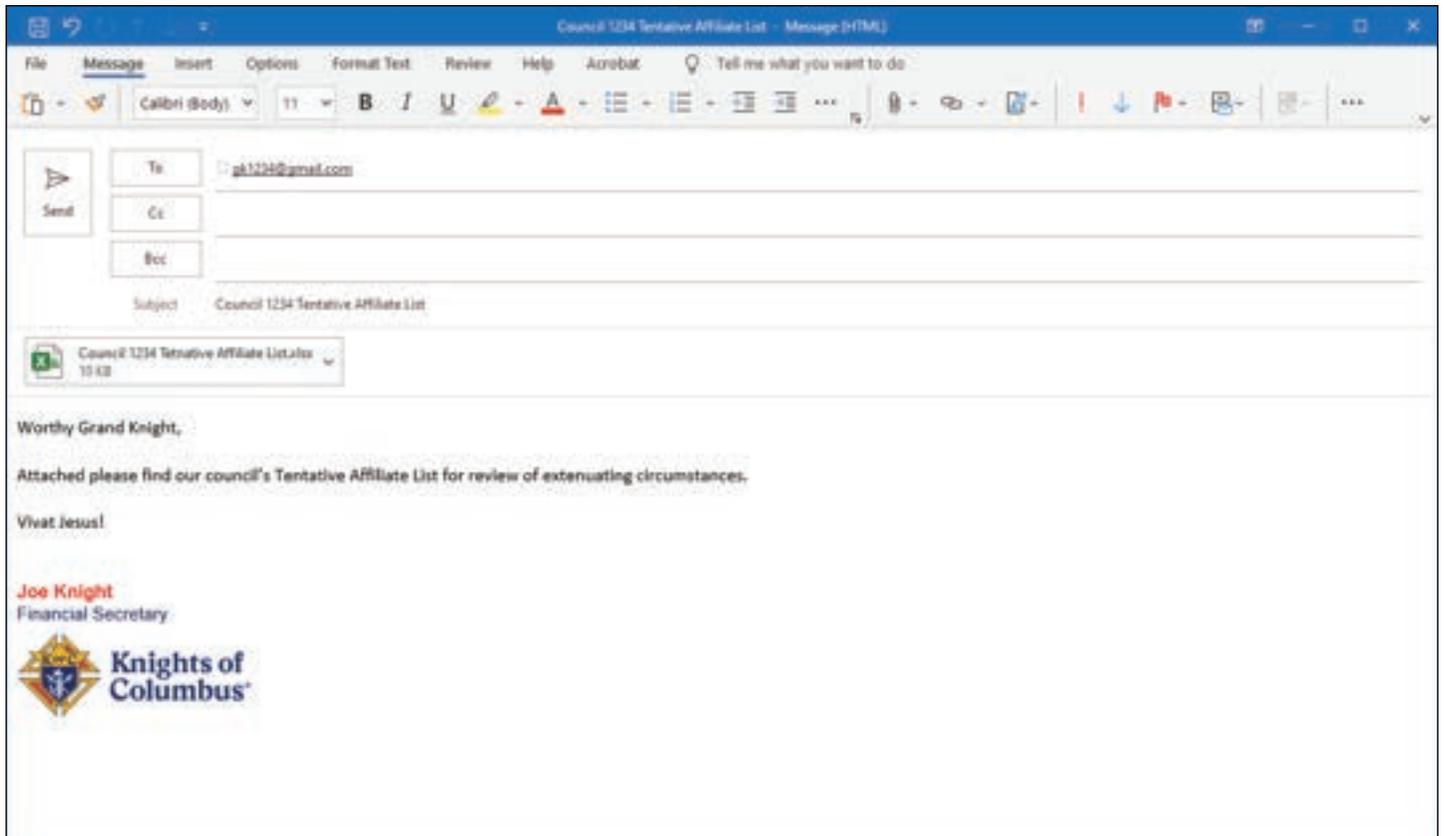


Figure XIII

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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

- ▶ 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:

General Contacts:

Select All

<input checked="" type="checkbox"/> Residence Phone	<input checked="" type="checkbox"/> Seasonal Phone
<input checked="" type="checkbox"/> Residence Phone Ext	<input checked="" type="checkbox"/> Seasonal Phone Ext
<input checked="" type="checkbox"/> Business Phone	<input checked="" type="checkbox"/> Primary Email
<input checked="" type="checkbox"/> Business Phone Ext	<input checked="" type="checkbox"/> Secondary Email
<input checked="" type="checkbox"/> Fax Number	<input checked="" type="checkbox"/> Tertiary Email
<input checked="" type="checkbox"/> Cell Phone	

Primary Address Information:

Select All

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

Secondary Address Information:

Select 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)

Fraternal & Personal Information:

Select All

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

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**
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**

- 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

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APPS02-P

Figure XVI – Grand Knight Email to District Deputy

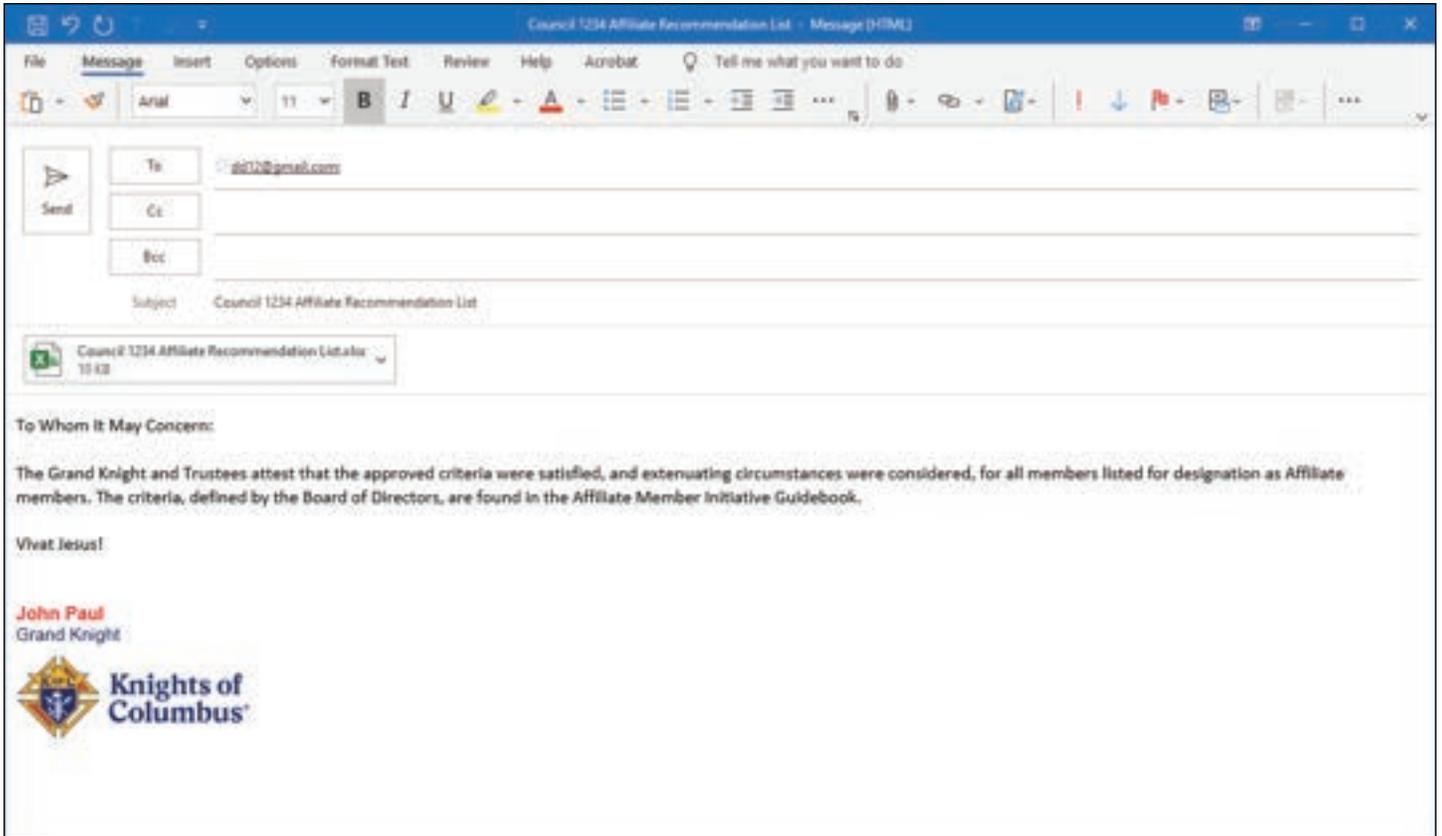
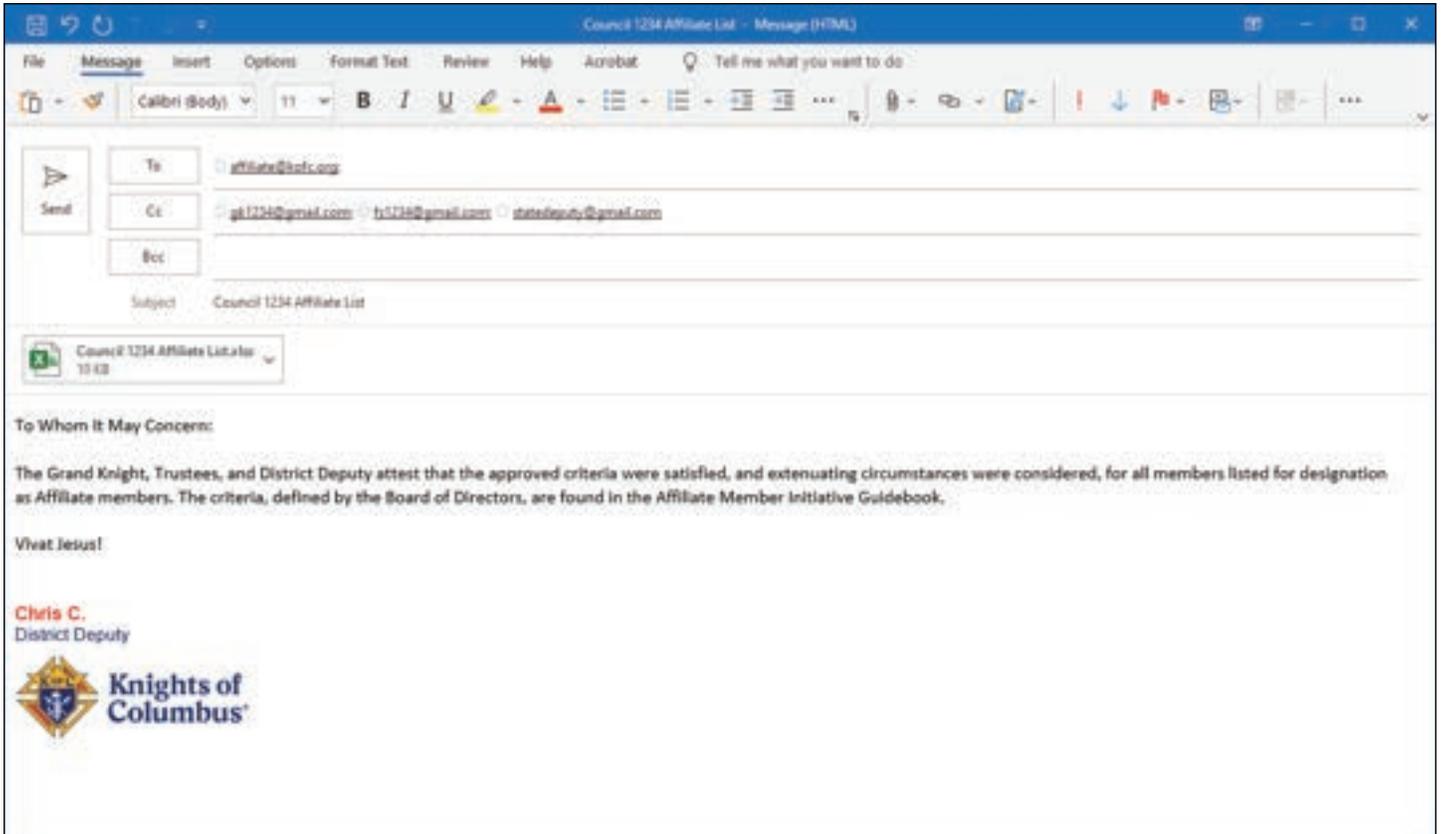


Figure XVII – District Deputy Email to Affiliate Mailbox



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 May 31st.**

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.

