

Financial Officer Workshop



Trustees



Treasurer



Financial Secretary





- ➔ **1. Overview**
- ➔ **2. Funds Management**
- ➔ **3. Semi-Annual Audit**
- ➔ **4. Recent Changes**



TIP!

This symbol will help provide tips and guidance.



Go in document section



Go to WEB Link



Return to home page



1. Overview

 **Rolls and Responsibilities**

 **Importance**

 **Checks & Balances**

 **Teamwork**



Helpful Resources

For Financial Secretaries, Treasurers & Trustees

- [Navigating Supreme Website](#)
- [Navigating Michigan State KofC Website](#)
- [Where to go for help](#)
- [How to Conduct a Council Audit](#)
- Form 1295 – [Semiannual Council Audit Report](#)
- [Treasurer Training Manual](#)
- [Trustee Training Manual](#)
- [Council Budget Template](#)
- **Charter** Constitution and Laws
- Leadership Resources

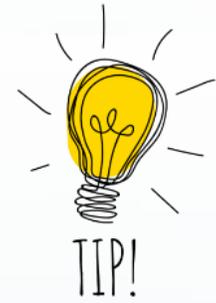
Primarily for Financial Secretaries

- [Member Management Training](#)
- Form 185 Video – <https://youtu.be/7M-KYfKBDig>
- Form 365 Video – <https://youtu.be/c0lswbh66tg>
- Prospect Tab – [E-Member to Council Process](#)
- Candidate Tab – [Candidate Tab Training Video](#)
- [Financial Secretary's Guide](#)
- [Summary of Financial Secretary's Responsibilities](#)



1a. Roles & Responsibilities

- ❖ **Financial Secretary – Maintains all financial and membership records.**
 - Uses Member Management software
- ❖ **Treasurer – Manages council funds & bank accounts**
 - Handles the checkbooks and all bank transactions
- ❖ **Trustees – Oversees all financial business of the council**
 - Prepares form 1295 & conducts the semi-annual audit



Duties
Responsibilities
Council Officers
Directors



1b – Why is Financial Management so important?



❖ **Manage council funds**

❖ Like a small business

❖ **Tax accounting**

❖ Like a small business

❖ **Proper control**

❖ Avoid mis-appropriation of funds



1c – Checks & Balances



Honest Mistakes

- ❖ Everyone makes mistakes
- ❖ Losing \$\$\$ is a big problem

Not-so-honest Mistakes

- ❖ Remove temptation
- ❖ Correct problems early



1d – Teamwork



Trustees
Oversees the process



Treasurer
Manages Bank Account(s)



Financial Secretary
Collects all Funds



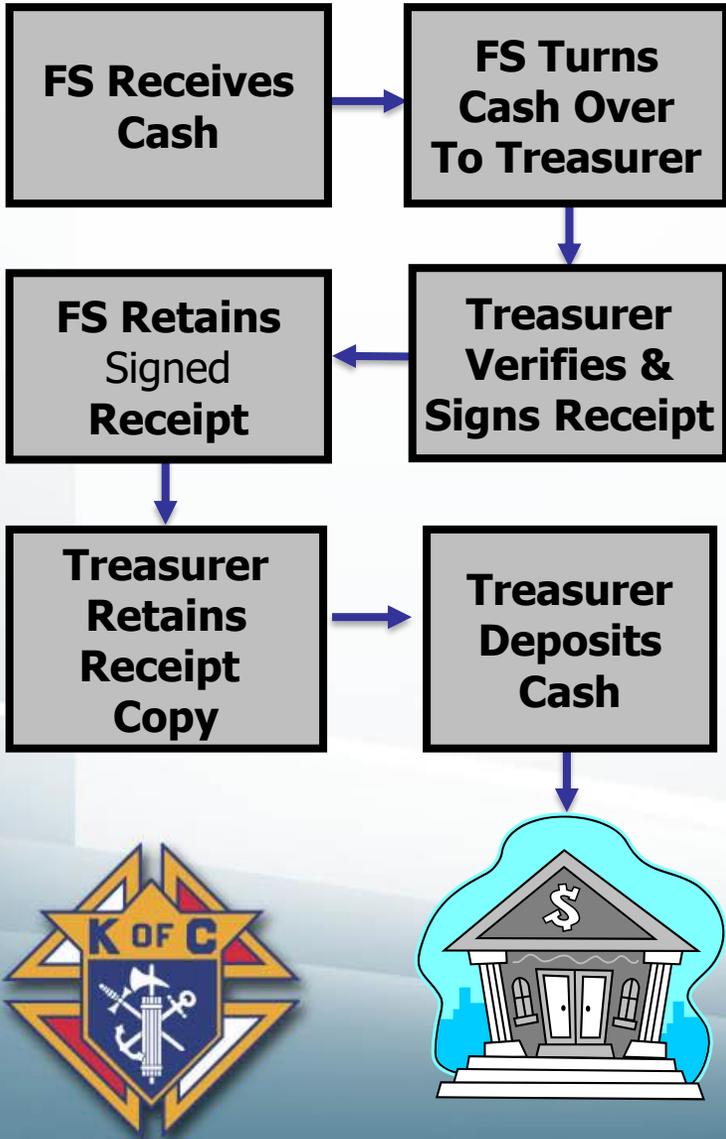
2. Funds Management



- ❖ **Receipts** – Incoming funds
- ❖ **Disbursements** – Outgoing funds
- ❖ **Monthly Reconciliation** – FS & Treasurer aligned?
- ❖ **Budgets** – Prepare & approve a council budget
- ❖ **Bonding**
 - ❖ \$5,000 – Treasurer & FS by Supreme
 - ❖ Additional amounts are available @ \$7/\$1,000



2a. Receipts



ST JOHN VIANNEY CO 11772
SHELBY TOWNSHIP, MI



Report of Receipts - Transaction Details

Receipt # Check #	Receipt Date	Member/Payor Account: Sub Account	Event	Description	Amount
Batch: 316		Date Processed: 03-04-2019			
2301 1393	02-28-2019	Leonard J Kujawa Assessments: Take 10 for Charity	Take "10" for Charity		4.00
2302 3443	03-03-2019	Alan M Berezik Assessments: Dues			40.00
2303 1393	02-28-2019	Leonard J Kujawa Assessments: Dues Assessments: Miscellaneous Assessments: Miscellaneous	Take "10" for Charity	Endowed Scholarship Fund	40.00 10.00 6.00
2304 1066	02-28-2019	Christopher D Blair Assessments: Dues Assessments: Miscellaneous Assessments: Miscellaneous	Take "10" for Charity	Endowed Scholarship Fund	40.00 10.00 6.00
Batch 316 Total:					156.00
Grand Total of Report of Receipts:					156.00

Respectfully submitted,

George J Stump
Financial Secretary

Received by:

Gerald M Meagher
Treasurer

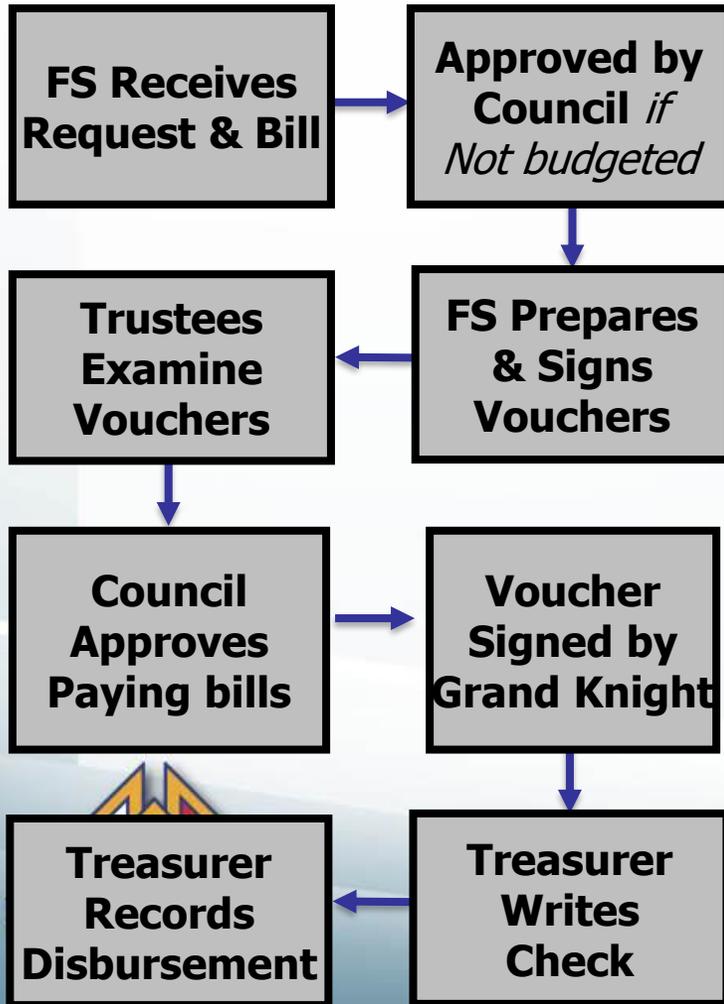
Knights of Columbus
No. 2/471

Initial 80-
Dues \$6.00-
TAKES \$20-
Spec. \$45-
SHMS \$15-
Misc. \$-
Reddm. \$-
Total \$760-

Council No. 50K
Date 2-28 2019
Rec'd of Eb Penneywith
Fin. Sec. Seven hundred sixty
Dollars
Treasurer



2b. Disbursements



ST JOHN VIANNEY CO 11772
SHELBY TOWNSHIP, MI



No. 1553
Date 2/22/2014
To St. Stephen's Church
For Rent - Feb.
\$ 200.00

WARRANT VOUCHER
Kights of Columbus
Fr. Rodofsky Council No. 50K
No. 1553
Date 2/22/2014
To Brother Samuel Shuplin, Treasurer,
Pay to the order of St. Stephen's Church
the sum of two hundred Dollars, \$ 200.00
In payment for rent for Feb.
Ed Penningworth Treasurer Secretary
William Edwards Grand Knight
Check No. 1553 Date 2/22/2014

Report of Vouchers

Voucher #	Check #	Voucher Date	Member/Payee / Address	Event	Description	Amount
Batch: 349		Date Processed: 07-20-2017				
912		07-18-2017	CPC Maintenance Fund Life Activities: Baby Bottle Campaign	Baby Bottle Fundraiser	CPC Ultrasound Machine maintenance	750.00
913		07-18-2017	Gary E Kopp 59276 Glacier Club Dr / Washington, MI 48094-4320 Activities: Miscellaneous		District 24 expenses	160.00
914		07-18-2017	St Jane Francis de Chantal K of C 13340 Activities: Food & Refreshments		Major Degree candidate cost	22.27
915		07-18-2017	Knights Of Columbus Supreme Council P. O. Box 1480 / New Haven, CT 06506-1480 Per Capita: Culture of Life Per Capita: Supreme Council Per Capita: Catholic Advertising		Culture of life Supreme per capita Catholic Advertising	164.00 197.19 88.00
Grand Total of Report of Vouchers:						1,381.46

Respectfully submitted,

George J Stump
Financial Secretary

Donald R Herman
Grand Knight

Received by:

Gerald M Meagher
Treasurer



2c. Monthly Reconciliation

1. Treasurer receives monthly bank statement
2. Treasurer adds any interest into checkbook and Cash Journal
3. Treasurer checks for any unusual charges or credits and deducts or adds to checkbook
4. Treasurer checks off all checks and deposits that have cleared
5. Treasurer writes in balance of statement in appropriate place on back of statement
6. Treasurer lists all open deposits and un-cashed checks in appropriate spots on statement
7. Balance derived on back should agree with checkbook – if not examine amounts and additions and subtractions until amounts are found
8. Treasurer reports all checks that have not been cashed that are beyond the legal period (usually six months) to Trustees at time of audit. Payees are to be written to see why checks have not been cashed.



2d. Budgets

Council 2020 - 2021 Fraternal Year Budget					
	2018 -2019 Actual	2019 -2020 Actual	2020 -2021 Budget	2020 - 2021 Actual YTD	2020 -2021 Budget O/U
Income					
Member Dues					0.00
Endowed Scholarship Fund					0.00
Take 10 for Charity					0.00
General - 50/50 Raffles					0.00
Vocations - RSVP, DAVL Refund					0.00
Food for Families Refund					0.00
Vocations - Golf Outing					0.00
General Funds - Operations					0.00
MI Drive					0.00
K of C Raffle Refund					0.00
<u>Charity Fundraisers</u>					0.00
Total Revenue	\$0.00	\$0.00	\$0.00	\$0.00	0.00
Expenses					
<u>Program Expenses</u>					
<u>Faith Activities</u>					
<u>Family Activities</u>					
<u>Community Activities</u>					
<u>Life Activities</u>					
<u>Council Assessments</u>					
Total Expenses	\$0.00	\$0.00	\$0.00	\$0.00	0.00

Purpose:

- Forecast
- Pre-approval of expenses
- Approved @ 2 meetings

Detail:

- Detailed enough to ensure the money is spent per the intent approved (Underlined lines should have an additional level of detail)
- Generic enough to allow sufficient flexibility
- Example:
 - \$500 for a Crisis Pregnancy Center donation (*listed under "Life Activities"*)



3. *Semi-Annual Audit*

❖ **Overview**

❖ **Preparation**

❖ **Audit – 3 main parts**

❖ Membership – Done via Member Management

❖ Income & Expenses

❖ Assets & Liabilities

❖ **Post-audit tasks**



TIP!

- [How to Conduct a Council Audit \(Word\)](#)
- [How to Conduct a Council Audit \(PDF\)](#)
- Semi-Annual Audit form
 - [PDF](#)
 - [Online \(Preferred Method\)](#)



3a. Overview

❖ When?

- ❖ Due by 8/15 – for January - June
- ❖ Due 2/15 – For July - December

❖ Who

- ❖ **Trustees** should do the audit using the records and documents supplied by the Financial Secretary and the Treasurer.
- ❖ **Financial Secretary** provides documentation and answers questions.
- ❖ **Treasurer** provides documentation and answers questions
- ❖ **Grand Knight** attends the audit and signs the audit form
- ❖ *Other potential people to invite to the audit include the DGK, DD & Recorder*



3c. Audit - Schedule A Membership

Member Management

❖ Skip Schedule A

❖ Minimizes work

❖ Preferred method

Manually fill this out

❖ Follow instructions shown

❖ Much more documentation needed (Council rosters, form 100s, etc.)



ADDITIONS	INS.	ASSO.	TOT.	Comments/Instructions
Total members start of period				Should match the council roster (Supreme website)
Initiations				Should match those recognized by Supreme
Transfers from other councils				Should match those recognized by Supreme
Transfers – assoc. to insurance				Should match those recognized by Supreme
Transfers – ins. To associate				Should match those recognized by Supreme
Re-entries				Should match those recognized by Supreme
Total for period				Add Initiations through re-entries (5 lines above)
Minus deductions				The figures for Total Deductions in the Deductions section are to be placed here and must be subtracted from the figures for Total for Period to obtain the correct figures for Number Members at End of Period
Number members end of period				Should match the council roster (Supreme website)

DEDUCTIONS	INS.	ASSO.	TOT.	Comments/Instructions
Suspensions				Should match those recognized by Supreme
Deaths				Should match those recognized by Supreme
<u>Withdrawals</u>				Should match those recognized by Supreme
Transfers – assoc. to insurance				Should match ADDITIONS line (reverse entry)
Transfers – ins. To associate				Should match ADDITIONS line (reverse entry)
Transfers to other councils				Should match those recognized by Supreme
Total deductions				Add all 6 lines above



3c. Audit Schedule B - FS Cash Transactions

FINANCIAL SECRETARY		Comments/Instructions
Cash on hand beginning of period	\$ _____	Should match the previous Audit Report showing Cash on Hand at End of Period
Cash received – dues, initiation	\$ _____	Accounting period totals from the Reports of Receipts <i>See note (below) on AUDITING DUES PAYMENTS</i>
Cash received from other sources; (Explain kind and amount)		Accounting period totals from the Reports of Receipts
Top Category \$ _____		
Second Category \$ _____		
All Other \$ _____	\$ _____	Sum of Top, Second & All Other.
Total Cash received	\$ _____	Sum of (1) Cash on hand at beginning of period, (2) Cash received – dues & initiation and (3) Cash received from other sources.
Transferred to Treasurer	\$ _____	Total of the figures shown on receipts from Treasurer to Financial Secretary for moneys received during the period by the Treasurer from the Financial Secretary
Cash on hand at end of period	\$ _____	Cash on Hand at End of Period will be amounts shown Paid to Treasurer subtracted from amount shown as Total Cash Received. Cash on Hand at End of Period should show a zero balance.



3c. Audit Schedule B – Treasurer Transactions

TREASURER		Comments/Instructions
Cash on hand beginning of period	\$ _____	Should match the figure shown on the previous audit from line Net Balance on Hand
Received from financial secretary	\$ _____	Should be the period total of the items in the Treasurer's Cash Book showing moneys received from the Financial Secretary. This should match the amount shown in the Financial Secretary's report on line Paid to Treasurer
Transfers from <u>sav./</u> other accounts	\$ _____	
Interest earned	\$ _____	
Total Cash received	\$ _____	
Disbursements		These should match the disbursements section of the Treasurer's Cash Book. <i>See note (below) on AUDITING CHECK REGISTER</i>
Per Capita Supreme Council	\$ _____	
State Council	\$ _____	
General Council Expenses		
Transfer to <u>sav./</u> other accounts		
Miscellaneous		
Total Disbursements		
Net balance on hand		



3c. Audit Schedule C – Assets

**ASSET
MANAGEMENT**

ASSETS		Comments/Instructions
Cash		
Undeposited funds	\$ _____	Moneys in the possession of either the Financial Secretary or treasurer, or both.
Bank – Checking Account	\$ _____	Assets labeled Bank — General Acct. and Bank — Special Acct. will be the reconciliation of the Treasurer’s checkbook(s) showing the net cash balance(s). Outstanding checks should be deducted from the bank statement.
- Savings Account	\$ _____	
- Money Market Accounts	\$ _____	
Due from _____ members		Obtained from the FS’s member ledger records. One indicator of the financial condition of a council is the number of members in arrears and the amounts owed. Be certain to include these figures on the report. <i>See note (below) on DUES FROM MEMBERS</i>
Total current assets	\$ _____	Total Current Assets is the total of the five previous lines
Less current liabilities	\$ _____	Should match the figure for Total Current Liabilities and is subtracted from Total Current Assets to obtain Net Current Assets
Net current assets		If liabilities exceed assets, the Total Current Assets should be subtracted from Current Liabilities and the resulting figure shown in (parenthesis).
Other assets		<i>See note (below) on INVESTMENTS.</i>
Short-term CDs	\$ _____	
Money Market	\$ _____	
Mutual Funds		
Misc. assets	\$ _____	
Total other assets		
Total assets		



3c. Audit Schedule C - Liabilities



LIABILITIES		Comments/Instructions
Due Supreme Council	\$ _____	Figures for the Liabilities section relative to the council's obligations to Supreme, state, as well as miscellaneous will be supplied by the Financial Secretary from his records and from unpaid bills in his possession. <i>See Note (below) on SUPREME PER CAPITA</i>
Per Capita	\$ _____	
Supplies	\$ _____	
Catholic advertising	\$ _____	
Other		
Due State Council	\$ _____	Advance payment of dues by members is to be included in Advance Payment by Members. For example, if a member pays dues in advance of the period billed, it is a liability because it represents dues payment not yet chargeable to the member.
Advanced payments by ____ members	\$ _____	
Misc. liabilities		

Total current liabilities		

3d. Post Audit Tasks



© Can Stock Photo

❖ Signatures – GK + Trustees (at least 2 of 3 Trustees)

❖ DGK can sign for either the GK or a Trustee (if necessary)

❖ Council Copies – Everyone who attended (everyone invited)

❖ GK, DGK, Treasurer, Trustees & Recorder

❖ Other Copies

❖ Supreme – council.accounts@kofc.org You will an auto-response

Your request has been received by General Office [ID: 2021-08-11-07.20.19.813720T01]

❖ State – forms@mikofc.org (*) When any form states that it is to be sent to the State Deputy

❖ District Deputy – DDXXX@mikofc.org (where XXX is District #)



(*) In 2020, roughly 5% of councils sent their audits to stateoffice@mikofc.org.
The State Office doesn't need (or want) copies of your audit.



4. *Recent changes (for FS's to be aware of)*

Title	Explanation
Prospect Tab (in Officers Online)	To be used when you are transferring online members into your council.
Candidate Tab (in Officers Online)	To be used to bring new members, transfers and reactivations into your council.



4a. Online Member Transfers – Prospect Tab

- ◆ Step 0: Member joins online
- ➔ ◆ Step 1: View Online Member Reports
- ◆ Step 2: Contact the Online Members (*)
- ◆ Step 3: Ask them to join (*)
- ◆ Step 4: Exemplification (*)
- ➔ ◆ Step 5: Update the Prospect Tab
- ➔ ◆ Step 6: Update Member Management
- ◆ Step 7: Welcome the new members (*)

() These steps should be performed by the Grand Knight and/or Membership Director.*



ONLINE MEMBERSHIP

Join the Knights with an online membership, no matter how much time you have to commit. Everyone is welcome.



View Online Member Reports

Reports are sent to Councils 3 ways:

- Prospect Tab – Officers Online (See next page) (District Deputies, Grand Knights & Financial Secretaries)
- Monthly Online Member Reports sent to DDs from SDRRs
- E-mail communication from State E-Member Director for each Online Member



Subject: District e-Member Update
Date: Sunday, August 30, 2020 at 1:27:30 PM Eastern Daylight Time
From: Dean Hayward
To: District Deputy 504
CC: Edward A. Nickel

Hi DD Rick,

There are eight e-Members in your District that have indicated that they want to join Councils in your District.

However, the Councils have not moved forward with taking the next steps.

Please find below their information:

Omer Bernal	8489
Rene Bernal	8489
Carl Davis	7418
Andy Toth	7418
Daniel Hall	6694
Benjamin Dahlgren	6742
Ryan D Schweitzer	8489
Jack L Massimino	6742

Please contact the Councils to see what can be done to get these members through the Exemplification process.

Please let me know if there is anything the Lansing Diocese Membership team can do to help.

----- Forwarded message -----

From: Douglas D. Kokot <d.kokot@mikofc.org>

Date: Fri, Oct 16, 2020 at 9:23 AM

Subject: Fwd: A New Brother Knight

To: District Deputy 4 <dd4@mikofc.org>, GK 7011 <gk7011@mikofc.org>, FS 7011 <fs7011@mikofc.org>, MD 7011 <md7011@mikofc.org>, District Deputy 104 <dd104@mikofc.org>

Cc: Walter Winkle <w.winkle@mikofc.org>, Dan Fuller <d.fuller@mikofc.org>, R. Terry Carl <r.carl@mikofc.org>

Worthy District Deputy, Grand Knight, Financial Secretary and Membership Director,
Great News!!!

George Washington has become an E-Member and attends St. Mary's (Washington, MI). He is interested in transferring his membership to your council. (see more of his details below)

Worthy Grand Knight and Financial Secretary, this member will appear in your Prospects tab in Officers Online. Once he has been vetted by the council and completes the first degree, he can be transferred to your council via Member Management or using a form 100.

Please contact him within the next few days. Invite him to a council meeting or activity (he is a Knight). Worthy District Deputy, please follow up with the council and let me know how things went within the next week.

Good luck on bringing a new Knight into your council.

Have a blessed day,

Doug Kokot
State E-Membership Director

Council
mbus



Officers Online Reports

Go to Supreme Website (www.kofc.org)

Click on Sign In  Login to Officers Online

Only District Deputies, Grand Knights and Financial Secretaries have access

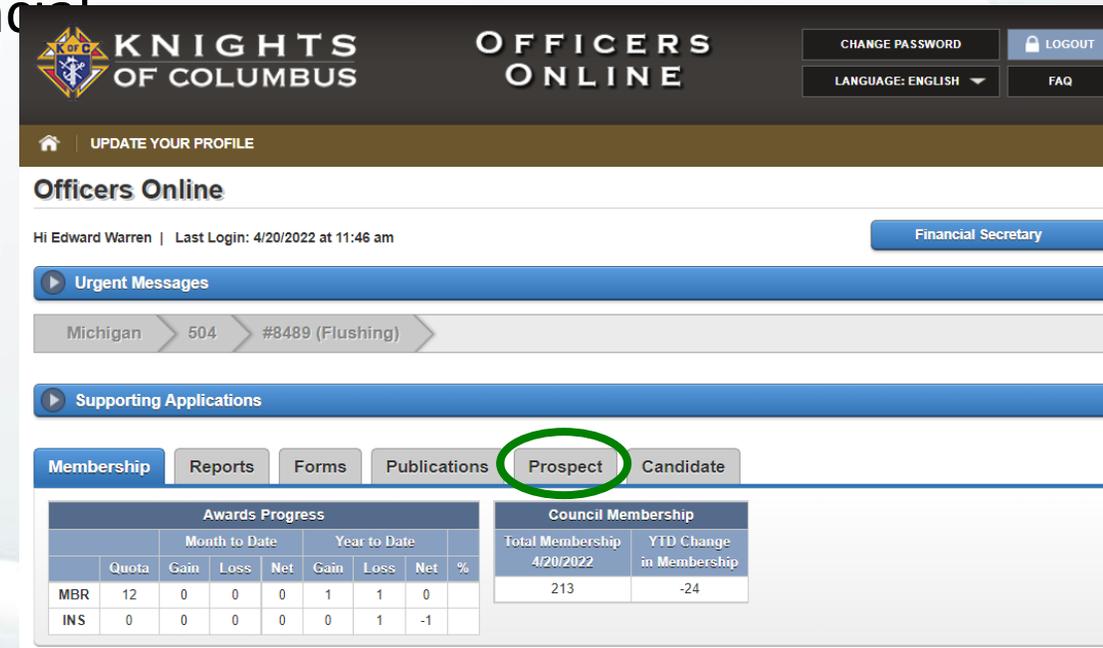
Enter User Name & Password and Sign In

Click on the Prospect Tab

[Online Membership Prospect Tab](#)



Watch the first 2 minutes of this 7 minute YouTube video to see how to login to Officers Online



KNIGHTS OF COLUMBUS OFFICERS ONLINE

CHANGE PASSWORD LOGOUT

LANGUAGE: ENGLISH FAQ

UPDATE YOUR PROFILE

Officers Online

Hi Edward Warren | Last Login: 4/20/2022 at 11:46 am Financial Secretary

Urgent Messages

Michigan > 504 > #8489 (Flushing)

Supporting Applications

Membership Reports Forms Publications **Prospect** Candidate

	Quota	Month to Date			Year to Date			%
		Gain	Loss	Net	Gain	Loss	Net	
MBR	12	0	0	0	1	1	0	
INS	0	0	0	0	0	1	-1	

Council Membership	
Total Membership 4/20/2022	YTD Change in Membership
213	-24



View Online Member Report (Prospect Tab)

Date	Name	Member #	City	Rejected By Council	Council #	Action
10/09/2018	Zach A Kelly	5114074	Dundee			Update Report
11/12/2018	Christopher J Friedland	5121090	Faystonville			Update Report
11/09/2018	Bruno Cavochia	5125004	Tampa			Update Report
11/05/2018	Ryan R Lopez	5124871	Tampa Palms			Update Report
11/07/2018	Dr Kevin Nelson	5126313	Palma Goo			Update Report
12/02/2018	Christopher P Szwed	5126803	Westly Chapel			Update Report
12/02/2018	Robert B Hall	2431000	Tallahassee			Update Report
12/02/2018	Ignacio J Perez	5126701	Pembroke Pines			Update Report
12/02/2018	Mr Ronald McCreary	5126644	Troy			Update Report

Assigned List

- Includes members that have said they want to join your council.
- It may also include members assigned to your council by our State E-Member Director.

List of Prospects

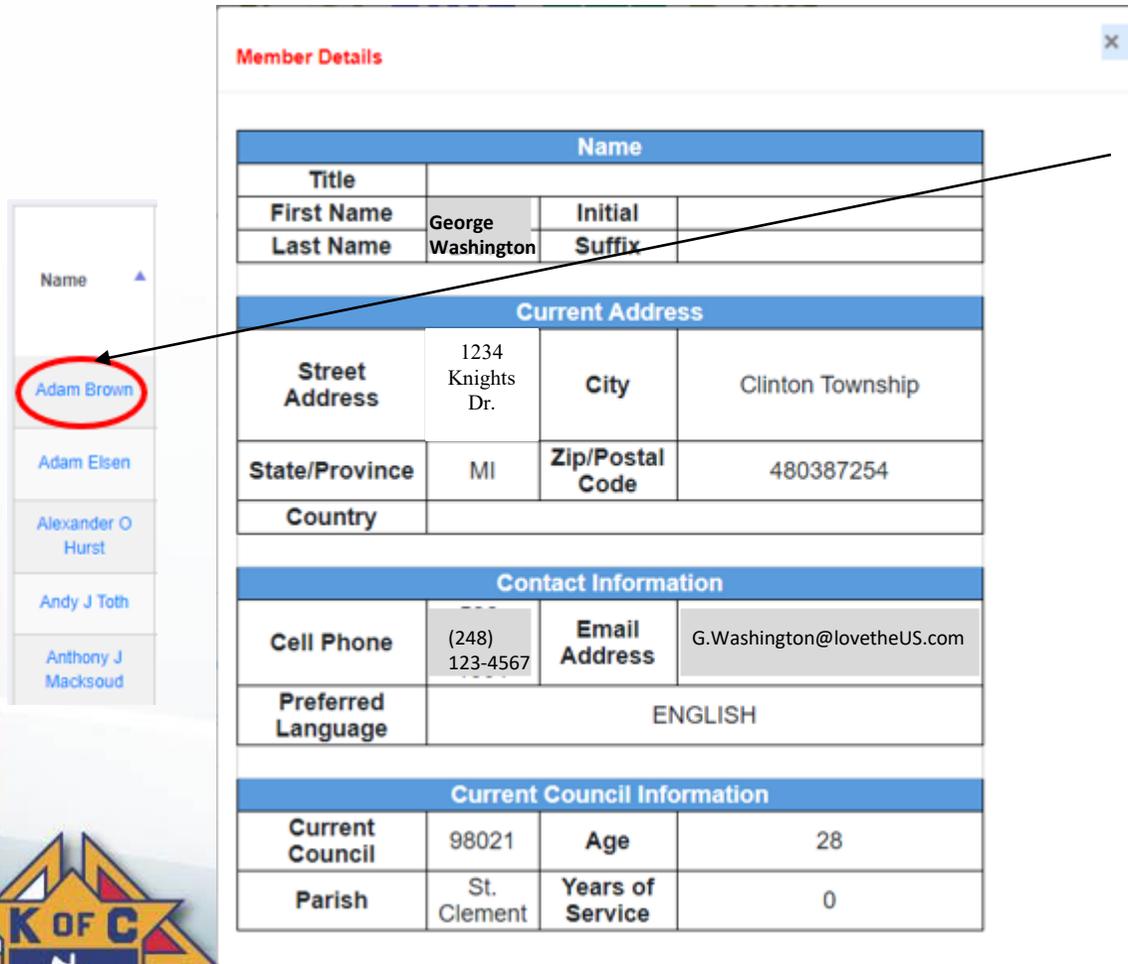
- Click on the prospect name to see detailed information for a specific Prospect. (See next page)

Action

- FS should pass the Prospect information along to the GK or Membership Director so the Prospect can be contacted.



Member Detailed contact information



Member Details

Name			
Title			
First Name	George	Initial	
Last Name	Washington	Suffix	

Current Address

Street Address	1234 Knights Dr.	City	Clinton Township
State/Province	MI	Zip/Postal Code	480387254
Country			

Contact Information

Cell Phone	(248) 123-4567	Email Address	G.Washington@lovetheUS.com
Preferred Language	ENGLISH		

Current Council Information

Current Council	98021	Age	28
Parish	St. Clement	Years of Service	0

Click on Member Name

Member Details

FS will need to pass this information on to the GK and/or MD for them to contact the prospect.



Update the Prospect Tab

Membership Reports Forms Publications **Prospect** Candidate

Assigned

Search:

Council #	Assigned Date	Name	Member #	Entry Date	Ceremonial Date	Action
3274	05/01/2020	Mr Matthew J Camano-Gonzalez	5154116	04/30/2020	MM/DD/YYYY	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
3274	05/01/2020	Mr Jonathan C Rodriguez	5154114	04/30/2020	MM/DD/YYYY	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
3274	01/31/2020	Segundo Pla	5138307	01/30/2020	MM/DD/YYYY	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
3274	12/30/2019	Mr Mchery J Kane	5132427	12/27/2019	MM/DD/YYYY	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
3274	12/04/2019	Mr Daniel Echevarria	5137150	12/04/2019	MM/DD/YYYY	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
3274	11/16/2019	Michael D Walsh	4215319	12/12/2007	MM/DD/YYYY	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>

 **Action / Transfer** – If you are transferring this member into your council...

 **Ceremonial Date** – Enter the date of his Exemplification.

 **Transfer** – Click transfer to complete the process.

 **Action / Reject** – If you do NOT want this member transferred to your council...

 **Reject** – Clicking Reject will remove this member from your list. He will be unassigned.

 **Select the Reason** – From the drop down box, select the reason this member is being rejected.



Please provide the reason for rejection. ✕

Select the Reason

Select the Reason
Eligibility Concerns
Council Incompatible
Does Not Want To Transfer



Update Member Management

Prospect Tab updates members as 1st Degree members

The new Exemplification makes them 3rd Degree members

FS needs to update Member Management to make them 3rd Degree members.

Login to Member Management & pull up the record for the new “1st Degree” member

Click on “Fraternal Information” & copy the 1st Degree date into the fields for 2nd & 3rd Degrees

Click

Send a notice to your Field Agent *(Either fill out a Form 100 or print the Member Info Report)*

Click on Member Info Report

Save the PDF

Email it to your Field Agent

Member		
Roosevelt, Franklin D.	 	Council 305
Member #: 1234567	Phone:	
DOB: 02-17-1963	Wife: Susan	
<input type="button" value="Prev"/> <input type="button" value="Next"/>		<input type="button" value="Email Member Info Report"/>



4b. Candidate Tab

New, Transfer or Reactive Members

- ◆ Step 1: FS receives Form 100 (*)
- ◆ Step 2: FS Adds candidate
- ◆ Step 3: Council approves member (*)
- ◆ Step 4: FS Updates the Candidate Tab
- ◆ Step 5: Update Member Management
- ◆ Step 6: Welcome the new members (*)

() These steps should be performed by the Grand Knight and/or Membership Director.*

KNIGHTS OF COLUMBUS OFFICERS ONLINE

CHANGE PASSWORD | LOGOUT
LANGUAGE: ENGLISH | FAQ

UPDATE YOUR PROFILE

Officers Online

Hi Edward Warren | Last Login: 4/20/2022 at 11:46 am | Financial Secretary

Urgent Messages

Michigan > 504 > #8489 (Flushing)

Supporting Applications

Membership | Reports | Forms | Publications | Prospect | **Candidate**

Awards Progress								
	Month to Date				Year to Date			
	Quota	Gain	Loss	Net	Gain	Loss	Net	%
MBR	12	0	0	0	1	1	0	
INS	0	0	0	0	0	1	-1	

Council Membership	
Total Membership	YTD Change in Membership
4/20/2022	213
	-24



Financial Secretary Adds the Candidate

Membership Reports Forms Publications Prospect **Candidate**

Pending Members

Search:

Created Date	Name	Email	Ceremonial/ Process Date	Action
03/30/2020	Anthony Martinez	Anthony@gmail.com	MM/DD/YYYY	<input type="button" value="Add"/> <input type="button" value="Process"/> <input type="button" value="Delete"/>

Previous 1 Next

Get Form 100(s) from Council

-  Make sure all information is filled out
-  Email address is critical

Go to the Candidate Tab

-  Login to Officers' Online
-  Click on the Candidate Tab

Click on



Key in all information from the Form 100

 **Knights of Columbus**

MEMBERSHIP FORM

Since 1882, membership in the Knights of Columbus has been open to men 18 years of age or older who are "practical" (that is, practicing) Catholics in union with the Holy See.

*Required Field

Council Number
8489

Title
Select Title

First Name

Middle Initial

Last Name

Suffix
Select Suffix

Email

Mobile Phone

Date of Birth
Month Day Year

Preferred Language
English

Mailing Address:

Address 1

Address 2

Zip/Postal Code

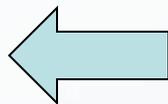
City

State

Country

Proposer Member #

Save



The member and officer's signatures are required for this form to be processed. Please complete this form legibly.

KNIGHTS OF COLUMBUS **Membership Document** **045**
A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	TRANSACTION	<input type="checkbox"/> NEW MEMBER <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REACTIVATION (inactive insurance)	<input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> SUSPENSION	<input type="checkbox"/> DEATH NEXT OF KIN RELATIONSHIP TELEPHONE # STREET CITY STATE POSTAL CODE
2	NAME	LAST FOUR DIGITS OF ZIP CODE: XXXXX-		
3	DATE OF BIRTH	MO	DAY	YEAR
4	ARE YOU A PRACTICING CATHOLIC?	YES	NO	I AM A MEMBER OF THE KNIGHTS OF COLUMBUS IN ANOTHER COUNCIL.
5	PROPOSER'S MEMBER NUMBER	MEMBER OF LAST COUNCIL COUNCIL NUMBER CITY STATE		

A copy of this form should be sent to the council agent for his records. SUPREME OFFICE COPY

- Name
- Address
- DOB
- Cell Phone is key
- Email is key
- Proposer's number
- Click **Save**

Once added to roster, go into Membership Management and type in the rest of his information



Process / Delete the Candidate

Membership Reports Forms Publications Prospect **Candidate**

Pending Members

Search:

Created Date	Name	Email	Ceremonial/ Process Date	Action
03/30/2020	Charles Harris	Charles@gmail.com	MM/DD/YYYY	<input type="button" value="Add"/> <input type="button" value="Process"/> <input type="button" value="Delete"/>
03/30/2020	Anthony Martinez	Anthony@gmail.com	MM/DD/YYYY	<input type="button" value="Process"/> <input type="button" value="Delete"/>

Previous 1 Next

Council approves (or denies)

-  Council Approves the candidate
-  Council decides NOT to allow the candidate to join your council.

Process (if approved)

Ceremonial Date:

-  **Add** = Date of Exemplification
-  **Transfer or Reactivation** = Date council approved the candidate

 Click

Delete (NOT approved)

-  Click This will remove the candidate from your list.



Officers Online Notification

Membership Reports Forms Publications Prospect **Candidate**

Pending Memb

Officers Online

Notification to process this member for your Council has been successfully sent to the Supreme Council.

OK

Created Date	Name	Email	Process Date	Action
03/30/2020	Anthony Martinez	Anthony@gmail.com	MM/DD/YYYY	Process Delete

Previous 1 Next

- ❖ Member is transferred
- ❖ No need to send Form 100 to Supreme
- ❖ Person is removed from the Candidate Tab
- ❖ You'll get a +1 toward your quota (if new or reactive)
- ❖ Member will receive an automated email
- ❖ Retain Form 100 for Council Record
- ❖ Forward a copy of the Form 100 to your Field Agent (or send the Member Info Report from MM)



Council's bills to Supreme

As of September 2021, Supreme went paperless in billing Councils. At the Officers Online page, scroll down and click "Reports", then click the PDF icon on the Financial Statement line. You will need to print this bill out and send it with payment.

Membership	Reports	Forms	Publications	Prospect	Candidate
Search: <input type="text"/>					
Report Name	Date	PDF	Excel		
Membership Roster	4/19/2022				
Membership Roster - January	1/1/2022				
Membership Roster - July	7/1/2021				
Financial Statement	4/1/2022				
Safe Environment Member Status	4/19/2022				
Safe Environment Participation Rate Report	4/19/2022				
Council Billing Statement (Past)	3/31/2022				

KNIGHTS OF COLUMBUS FINANCIAL STATEMENT SUMMARY AND PAYMENT COUPON

DATE	ST	COUNCIL	LOCATION	FINANCIAL SECRETARY			
04/01/2022	MI	8489	FLUSHING	EDWARD V WARREN			
SUMMARY FINANCIAL INFORMATION			ACCOUNTS				
			PER CAPITA	CATHOLIC ADV	CULTURE OF LIFE	SUPPLIES	TOTAL
AMOUNTS DUE			0.00	0.00	0.00	0.00	0.00
*This statement is for information purposes only. For details, please refer to billing statement you will receive by mail.							

PAYMENT COUPON

KNIGHTS OF COLUMBUS SUPREME COUNCIL				
ST	COUNCIL	LOCATION	REMIT DATE:	04/01/2022
MI	8489	FLUSHING	TOTAL AMOUNT DUE:	0.00

KNIGHTS OF COLUMBUS
PO BOX 382172
PITTSBURGH, PA 15251-8172

8000000021008469400000004012217

Contrary to this statement, you will NOT be sent a billing statement by mail!!

Address your envelope to this address



Leadership Resources, #5093 pgs. 8-9

Financial Secretary

- Upon recommendation of the grand knight and the trustees, the financial secretary is appointed for a three-year term that is approved by the supreme knight
- The prospective financial secretary must also complete and submit the *Application for Appointment as Financial Secretary* (#FS-101)
- Under Section 130 of the Laws of the Order, the financial secretary is automatically bonded in the amount of \$5,000. Additional bonding may be provided at a cost of \$7 per thousand by contacting the supreme secretary's office
- Collects money, in the form of dues, from members. Responsible for sending billing notices and initiating retention measures by providing a list of delinquent members to the grand knight to prevent members from being suspended for nonpayment of dues
- Ensures that the council membership records are updated and that new members sign the constitutional roll
- Receives from the Supreme Council Headquarters honorary and honorary life membership cards for distribution to qualified members
- Files various reports and membership/ insurance transactions with the Supreme Council Headquarters
- Responsible for completing and submitting the proper 990 for the council (U.S. only)
- Keeps the seal of the council and affixes the same to membership cards, resolutions and other official documents as necessary

Much greater details given in same handbook on pages 27 – 36.

Latest version is 2/21.



Walk-thru for Form 185, due July 1st

KNIGHTS OF COLUMBUS OFFICERS ONLINE

CHANGE PASSWORD LOGOUT

LANGUAGE: ENGLISH FAQ

UPDATE YOUR PROFILE

Officers Online

Hi Edward Warren | Last Login: 4/22/2022 at 12:59 pm Financial Secretary

Urgent Messages

Michigan 504 #8489 (Flushing)

Supporting Applications

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

OFFICERS ONLINE LANGUAGE: ENGLISH

Please note that Member Management / Billing will be down between 4:00 am – 6:00 am (Eastern) on the following days: April 21, April 26 and April 28 for routine maintenance.

The Service Program Personal (also known as Form 365) will be recorded as received when the following required roles have been appointed - Program Director, Community Director, Family Director, Membership Director, and Retention Chairman.

Safe Environment Requirements can be found at kofc.org/safe

Please note that the Member Management, Member Billing and By-Laws Online Call Center's new telephone number is 203-752-4210. When calling, please select option 1.

LIVE TRAINING



Walk-thru for Form 185, due July 1st

English | Español | Français Home | Contact Us | Logout

 Find a Member by Last Name: [Print this screen](#) 

Officers Online | Member Billing | 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

English | Español | Français Home | Contact Us | Logout

 Find a Member by Last Name: [Print this screen](#) 

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

- Council Administration
- Council Information
- Council Officers Current & Next**
- Service Program Personnel Current & Next
- Additional Positions
- Member Interests
- Parish List
- Title List
- Download Tools

Council Administration - Council Information

Council

 **FLUSHING** Council 8489

Council Location: FLUSHING Jurisdiction: MI
District: 504 Date of Institution: 11-29-1983

Key Contacts | Detail Info | Address Info | Meeting Info |

Key Contacts



Walk-thru for Form 185, due July 1st

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS Find a Member by Last Name: Go Print this screen 

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

- Council Administration
- Council Information
- Council Officers Current & Next
- Current Year**
- Next Fraternal Year
- Service Program Personnel Current & Next
- Additional Positions
- Member Interests
- Parish List
- Title List
- Download Tools

Council Administration - Council Officers - Current 

Council

 **FLUSHING** Council 8489

Council Location: FLUSHING Jurisdiction: MI
District: 504 Date of Institution: 11-29-1983

Current Council Year 2021-2022

Change a Current Officer

Council Members Members from Other Councils

Choose a Role: Grand Knight Search by Last Name: Search Enter Start Date: 
Search Tips MM-DD-YYYY Default is today's date
Choose Member: UNASSIGNED Assign

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS Find a Member by Last Name: Go Print this screen 

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

- Council Administration
- Council Information
- Council Officers Current & Next
- Current Year
- Next Fraternal Year**
- Service Program Personnel Current & Next
- Additional Positions
- Member Interests
- Parish List
- Title List
- Download Tools

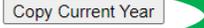
Council Administration - Council Officers - Next Year 

Council

 **FLUSHING** Council 8489

Council Location: FLUSHING Jurisdiction: MI
District: 504 Date of Institution: 11-29-1983

Next Fraternal Year 2022-2023



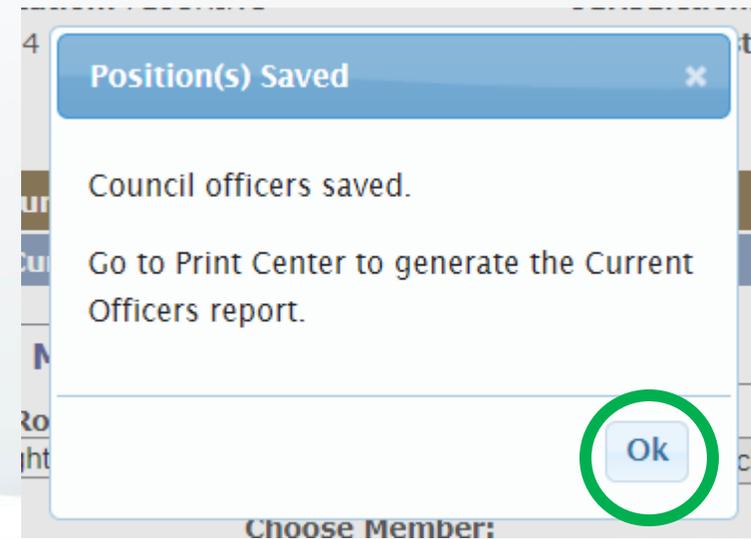
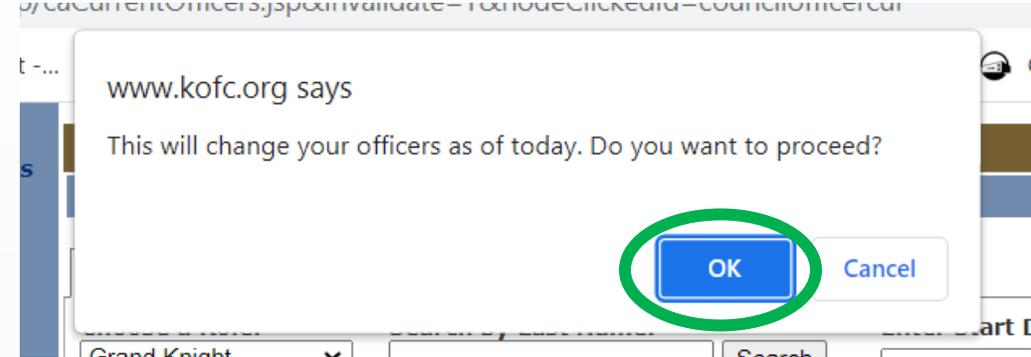
Council Members Members from Other Councils

Choose a Role: Grand Knight Search by Last Name: Search Enter Start Date: 
Search Tips MM-DD-YYYY Default is today's date
Choose Member: UNASSIGNED Assign



Walk-thru for Form 185, due July 1st

Next Year Officers			
Officer Positions	Name	Member#	Start Date
Grand Knight	Smith, Jacob E		07-01-2022
Financial Secretary	Warren, Edward V		07-01-2022
Deputy Grand Knight	Winchester, William A		07-01-2022
Chancellor	Miller, Thomas J		07-01-2022
Recorder	Ellavich, Nicholas J		07-01-2022
Treasurer	Cozart, Joseph R		07-01-2022
Advocate	Hartmann, Matthew E		07-01-2022
Warden	Tomalia , Randy Scott		07-01-2022
Inside Guard	Saucier, George E		07-01-2022
Outside Guard	Anderson, David E		07-01-2022
One Year Trustee	UNASSIGNED		07-01-2022
Two Year Trustee	Smith, Jonathan S		07-01-2022
Three Year Trustee	Fralick, Daniel L		07-01-2022
Appointed Officers			
	Name	Member#	Start Date
Chaplain	UNASSIGNED		07-01-2022
Lecturer	UNASSIGNED		07-01-2022



That is it, no need to send a copy to Supreme.



Walk-thru for Form 365, due August 1st

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS Find a Member by Last Name: Go

Print this screen  

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

- Council Administration
 - Council Information
 - Council Officers Current & Next
 - Service Program Personnel Current & Next
 - Next Fraternal Year
 - Additional Positions
 - Member Interests
 - Parish List
 - Title List
 - Download Tools

Council Administration - Program Personnel - Next Year

Council

FLUSHING Council 8489

Council Location: FLUSHING Jurisdiction: MI
District: 504 Date of Institution: 11-29-1983

Next Fraternal Year 2022-2023

Copy Current Year

Change Service Program Personnel

Supreme Defined Positions Council Defined Positions

Choose a Role: Program Director Search by Last Name: Search Enter Start Date: 07-01-2022 

Search Tips
Choose Member:
UNASSIGNED Assign

Next Year Service Program Personnel

Program Positions	Name	Member#	Start Date
Program Director	★ UNASSIGNED		07-01-2022
Faith Director	UNASSIGNED		07-01-2022
Vocations Chairman	UNASSIGNED		07-01-2022
Community Director	★ UNASSIGNED		07-01-2022
Life Director	UNASSIGNED		07-01-2022
Health Service	UNASSIGNED		07-01-2022
Public Relations	UNASSIGNED		07-01-2022
Family Director	★ UNASSIGNED		07-01-2022
Membership Director	★ UNASSIGNED		07-01-2022
Recruitment Committee 1	UNASSIGNED		07-01-2022
Recruitment Committee 2	UNASSIGNED		07-01-2022
Recruitment Committee 3	UNASSIGNED		07-01-2022
Retention Chairman	★ UNASSIGNED		07-01-2022
Insurance Promotion	UNASSIGNED		07-01-2022
Additional Appointments	Name	Member#	Start Date

No Additional Appointments at this time

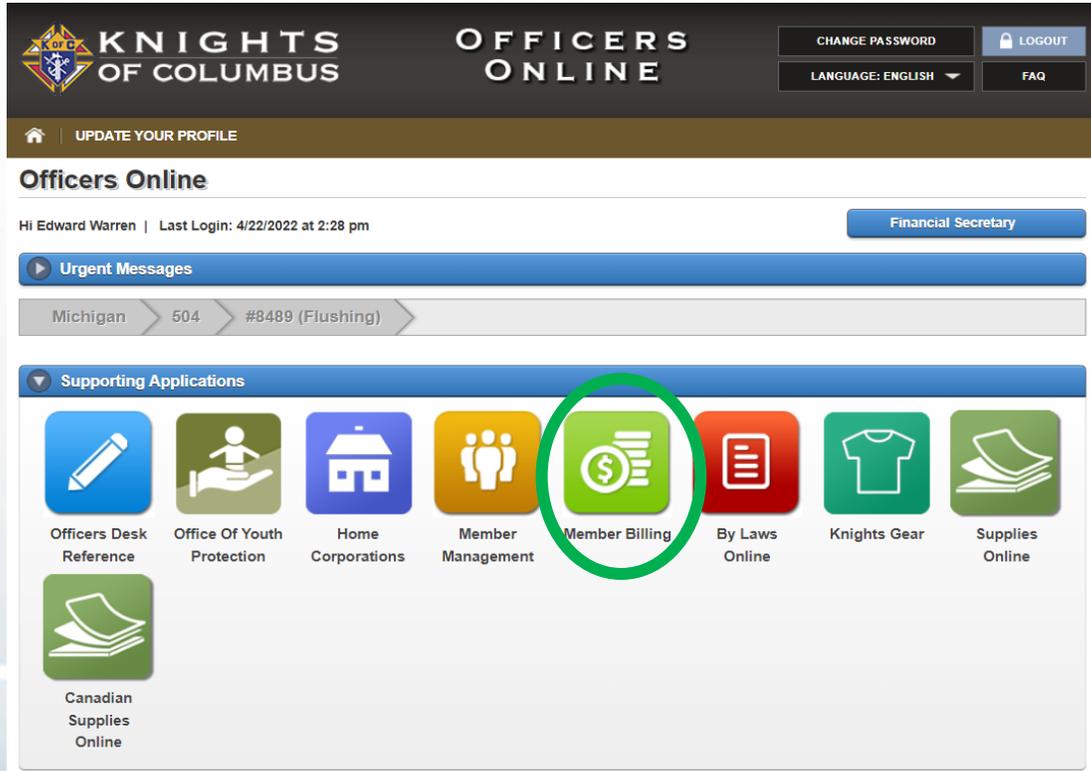
Add a Program Position

Submit Reset

That is it, no need to send a copy to Supreme.



Walk-thru for printing Membership cards



KNIGHTS OF COLUMBUS OFFICERS ONLINE

CHANGE PASSWORD | LOGOUT
LANGUAGE: ENGLISH | FAQ

UPDATE YOUR PROFILE

Officers Online

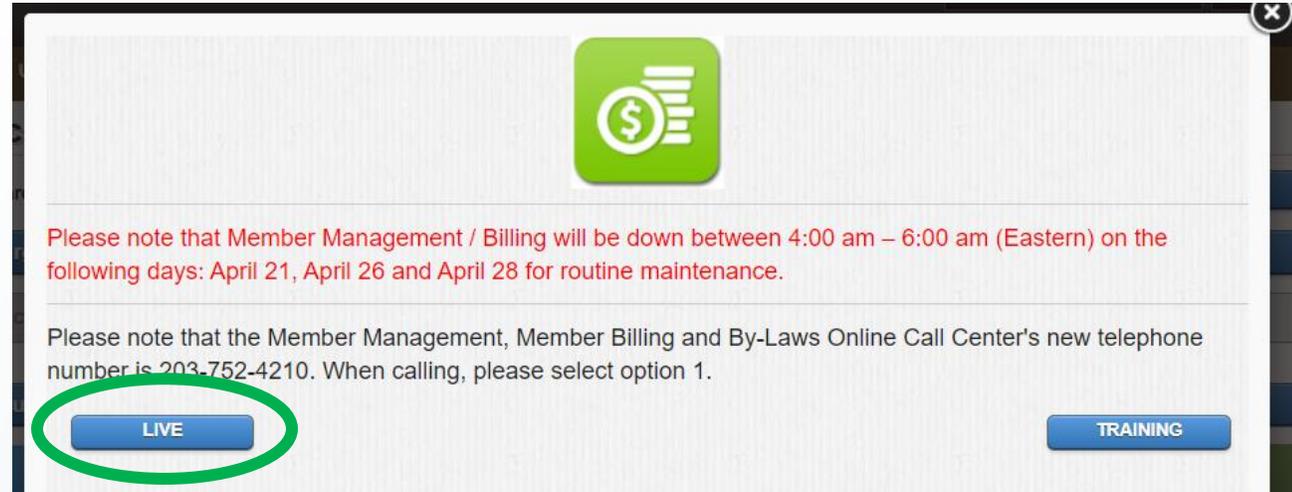
Hi Edward Warren | Last Login: 4/22/2022 at 2:28 pm [Financial Secretary](#)

Urgent Messages

Michigan > 504 > #8489 (Flushing)

Supporting Applications

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





Please note that Member Management / Billing will be down between 4:00 am – 6:00 am (Eastern) on the following days: April 21, April 26 and April 28 for routine maintenance.

Please note that the Member Management, Member Billing and By-Laws Online Call Center's new telephone number is 203-752-4210. When calling, please select option 1.

[LIVE](#) [TRAINING](#)



Walk-thru for printing Membership cards

English | Español | Français Home | Contact Us | Logout

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

Find a Member by Last Name: Go

Print this screen  

Officers Online Member Management Member Billing **Print Center-MB**

Council Ledger

- Receipts
- Vouchers
- Assessments**
- Adjustments
- Billing Information
- Member Information
- Email

Council Billing & Accounting - Council Ledger

Council

FLUSHING Council 8489

Council Location: FLUSHING Jurisdiction: MI
District: 504 Date of Institution: 11-29-1983

View Transactions

By Date By Transaction Type By Income Account By Expense Account By Event

Show from: to: Search

MM-DD-YYYY MM-DD-YYYY

English | Español | Français Home | Contact Us | Logout

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

Find a Member by Last Name: Go

Print this screen  

Officers Online Member Management Member Billing **Print Center-MB**

Council Billing & Accounting - Enter Dues Assessment

Council

FLUSHING Council 8489

Council Location: FLUSHING Jurisdiction: MI
District: 504 Date of Institution: 11-29-1983

Reset

Billing Cycle

Billing Period: **Jan 01, 2023 - Dec 31, 2023** Billing Status: 1st Notice As of Date: 04-22-2022

MM-DD-YYYY

Assess Dues

Amounts to be Assessed



Membership cards cannot be printed for the next year until 60 prior to January 1st, in this case



Walk-thru for printing Membership cards

English | Español | Français Home | Contact Us | Log

KNIGHTS OF COLUMBUS IN SERVICE TO ONE. IN SERVICE TO ALL. Find a Member by Last Name: Go

Print this screen

Officers Online Member Management Member Billing Print Center-MB

Print Center - Treasurer Reports

Treasurer - Receipt Reports

1. Report of Receipts
2. Report of Receipts - Transaction Details
3. Report of Pending Receipts
4. Report of Pending Receipts - Transaction Details

- Treasurer Reports
- Receipt Reports
- ▶ Voucher Reports
- ▶ Billing
- ▶ Membership Cards
- ▶ Retention
- ▶ Journals & Ledger
- ▶ Labels
- ▶ Miscellaneous Reports
- ▶ Data Extract Tool
- ▶ Email

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS IN SERVICE TO ONE. IN SERVICE TO ALL. Find a Member by Last Name: Go

Print this screen

Officers Online Member Management Member Billing Print Center-MB

Print Center - Membership Cards

Membership Cards

1. By Member Type
2. All Members whose Dues are Current
3. By Degree Date
4. Blank Membership Card Template
5. Back of Card

- ▶ Treasurer Reports
- ▶ Billing
- Membership Cards
- ▶ Retention
- ▶ Journals & Ledger
- ▶ Labels
- ▶ Miscellaneous Reports
- ▶ Data Extract Tool
- ▶ Email

Even if you don't use Member Billing, you can print Membership cards

Use By Member Type

Use Back of card is the Financial Secretary's information

Print a few sheets of the blank type cards in case someone loses theirs or when you get new members joining your Council



Walk-thru for printing Membership cards

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 | Member Billing | **Print Center-MB**

Print Center - Membership Cards 

Membership Cards - Print Back of Card

Additional Options / Requirements

Your full name and title will always appear on the back of the Membership Card. Please select one or more of the additional contact options you would like to display:

Click all information that applies

- Address Information
- Residence Phone
- Business Phone
- Cell Phone
- Primary Email

[Back](#)

Edward V Warren
Financial Secretary

3217 Kings Brook Dr
Flushing, MI 48433-2419
C: 810-241-4847
lazered2003@yahoo.com

Edward V Warren
Financial Secretary

3217 Kings Brook Dr
Flushing, MI 48433-2419
C: 810-241-4847
lazered2003@yahoo.com

Edward V Warren
Financial Secretary

3217 Kings Brook Dr
Flushing, MI 48433-2419
C: 810-241-4847
lazered2003@yahoo.com

Edward V Warren
Financial Secretary

3217 Kings Brook Dr
Flushing, MI 48433-2419
C: 810-241-4847
lazered2003@yahoo.com



Additional Options / Requirements

Reporting Service

Thank you for waiting, your report is ready.

Print Cards

Order Supplies Online #4817E, 1 pack has 25 sheets for 200 cards for \$3.75



Walk-thru for printing Membership cards

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS Find a Member by Last Name: Print this screen

Officers Online | Member Management | Member Billing | **Print Center-MB**

Print Center - Membership Cards

Membership Cards - **By Member Type**

Additional Options / Requirements

Select Member Type:

- All Members
- All Members
- Regular
- Honorary
- Honorary Life
- Members on Exemption

[Back](#)



Additional Options / Requirements

Reporting Service

Thank you for waiting, your report is ready.

Print Card

<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER David Abbott</p> <p>MEMBER NO. [REDACTED] IS A 3rd DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>	<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER David F Alunno</p> <p>MEMBER NO. [REDACTED] IS A 3rd DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>
<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER Michael A Abdella</p> <p>MEMBER NO. [REDACTED] IS A 1st DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>	<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER Daniel F Anderson</p> <p>MEMBER NO. [REDACTED] IS A 3rd DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>
<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER Shane Adams</p> <p>MEMBER NO. [REDACTED] IS A 1st DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>	<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER David E Anderson</p> <p>MEMBER NO. [REDACTED] IS A 3rd DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>
<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER Daniel J Alling</p> <p>MEMBER NO. [REDACTED] IS A 3rd DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>	<p>THIS IS TO CERTIFY THAT</p> <p>BROTHER Dennis L Anderson</p> <p>MEMBER NO. [REDACTED] IS A 3rd DEGREE MEMBER OF COUNCIL NO. 8489 IN FLUSHING MI</p> <p>DUES PAID TO: December 31, 2022</p> <p>_____ G.K. _____ F.S. _____ MEMBER SIGNATURE</p>



Supreme Video Training

Supporting Applications

Membership Reports Forms **Publications** Prospect Candidate

Search:

Publication Name	Date	Type
Assembly Leaders Resources		
Beatification Resources		
Ceremonials Resources		
Faith in action: Program Resources		
Fraternal Leader Advisory		
Fraternal Operations Resources		
Inviting Men to Join		
Knightline		
Leadership Handbooks		
Training & Webinars		

FRATERNAL TRAINING



FRATERNAL TRAINING WEBINARS

Join the staff of the Fraternal Mission Department as we discuss relevant topics for effective council operation, membership recruitment and conducting charitable outreach programs that engage council members.



FRATERNAL 'HOW TO' VIDEOS

Fraternal 'How To' Videos are short tutorials that walk fraternal leaders through essential Knights of Columbus tools and procedures.

[LEARN MORE](#)



OFFICER RESOURCES

Overwhelmed by all the resources available to you as a fraternal leader? Check out our recommended go to resources for council leaders.

[FIND YOUR RESOURCES](#)



Supreme Video Training

OFFICER RESOURCES

For All Officers

[Fraternal Planner \(#5033\)](#)

[Leadership Resources \(#5093\)](#)

Safe Environment

[Safe Environment Training for Leaders](#)

The Safe Environment Training for Leaders should be taken by all state deputies, state advocates, state program directors, state youth directors, state community directors, state family directors, state squire chairman, grand

**FRATERNAL
TRAINING**

FIELD TRAINERS
(ARGTD)

← OFFICER RESOURCES

**FRATERNAL VIDEO
LIBRARY**

FRATERNAL VIDEO LIBRARY

The screenshot shows the Fraternal Video Library website. On the left is a navigation menu with a 'VIDEOS' header and a search bar. Below the search bar are categories: Communications, Council Operations, District Deputy, Forms, Meetings, Member Management/Member Billing, Membership, Officers Online, and Programs (Faith in Action). The main content area features a video player for 'Fraternal Programs Report Form (#10784) Training Video' (6:40 duration). Below the video player is a section titled 'Member Management / Member Billing' with three thumbnails for 'Data Extract Tool Training Video', 'Email Tool Training Video', and 'Setting Up New Members During'.



Michigan State Council FS resources

Council Officers

Mikofc.org

» [State Resources](#) » Training Material » Council Officers

-  - [GK & FS - MIKOFC Gmail Overview video 13:31 20.06](#)
-  - [GK & FS - MIKOFC Email Support Directions video 1:50 21.01](#)
-  - [GK & FS Officers Online Overview Video](#)
-  - [GK & FS - Member Management Training 14.08](#)
-  - [GK & FS - Member Management Email Tool](#)
-  - [GK & FS - E-Membership Join Process 20.10](#)
-  - [GK & FS - E-Member to Council Process 21.01](#)
-  - [Financial Officer Training video 21.05 \(FS, Treasurer & Trustees\)](#)
-  - [Financial Officer Training 21.01](#)
-  - [Financial Officer - How to Conduct a Council Audit \(PDF\) 20.11](#)
-  - [Financial Officer Council Budgets and Spending Money.](#)
-  - [FS Member Management Training 14.08](#)
-  - [FS Council Budget Template 20.11](#)
-  - [FS Candidate Tab Training Video](#)



Affiliate Program

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



Affiliate Program

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.



Affiliate Program

***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.*

If you do not use Member Billing you can still use this process but all your Dues Assessed will be zero. The FS will now have to go through the list and delete the lines that are not intended for this council tentative affiliate list.



Affiliate Program

- 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 (A1) “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



Affiliate Program

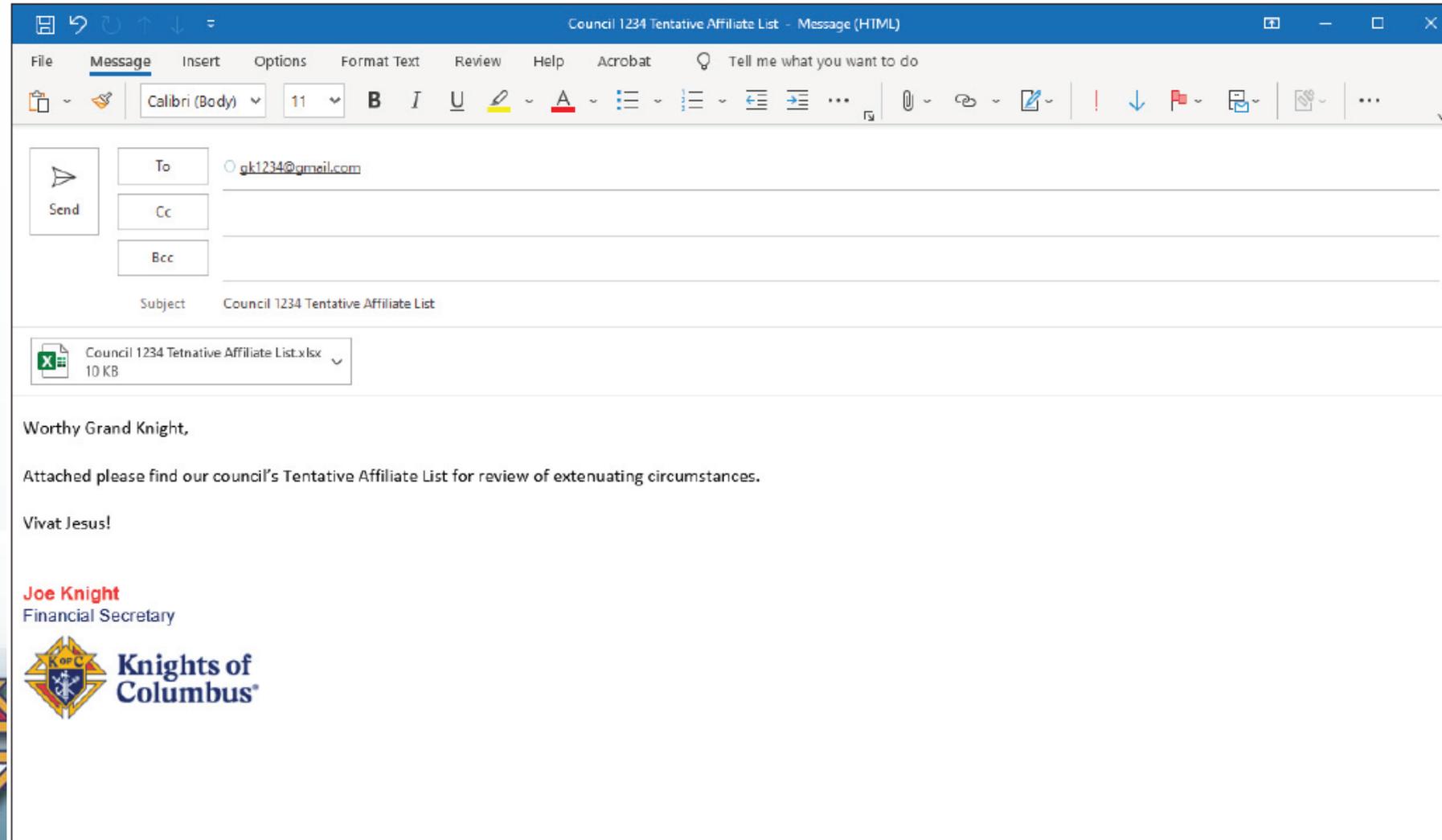
- x. Change the default format from “CSV” to “Excel Workbook” by clicking the arrow next to the save button and selecting “Excel Workbook .xlsx”
- xi. Save your file as “Council XXXX Tentative Affiliate List”
- c. Send the list of tentative designated members to the Grand Knight (Please refer to Figure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

Save the file as Council {your Council number} Tentative Affiliate List.xlsx.



Affiliate Program

Figure XII – Financial Secretary Email to Grand Knight



Affiliate Program

Figure XVI – Grand Knight Email to District Deputy

Council 1234 Affiliate Recommendation List - Message (HTML)

File Message Insert Options Format Text Review Help Acrobat Tell me what you want to do

Arial 11 B I U A

To dd12@gmail.com

Cc

Bcc

Subject Council 1234 Affiliate Recommendation List

Council 1234 Affiliate Recommendation List.xlsx
10 KB

To Whom It May Concern:

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.

Vivat Jesus!

John Paul
Grand Knight

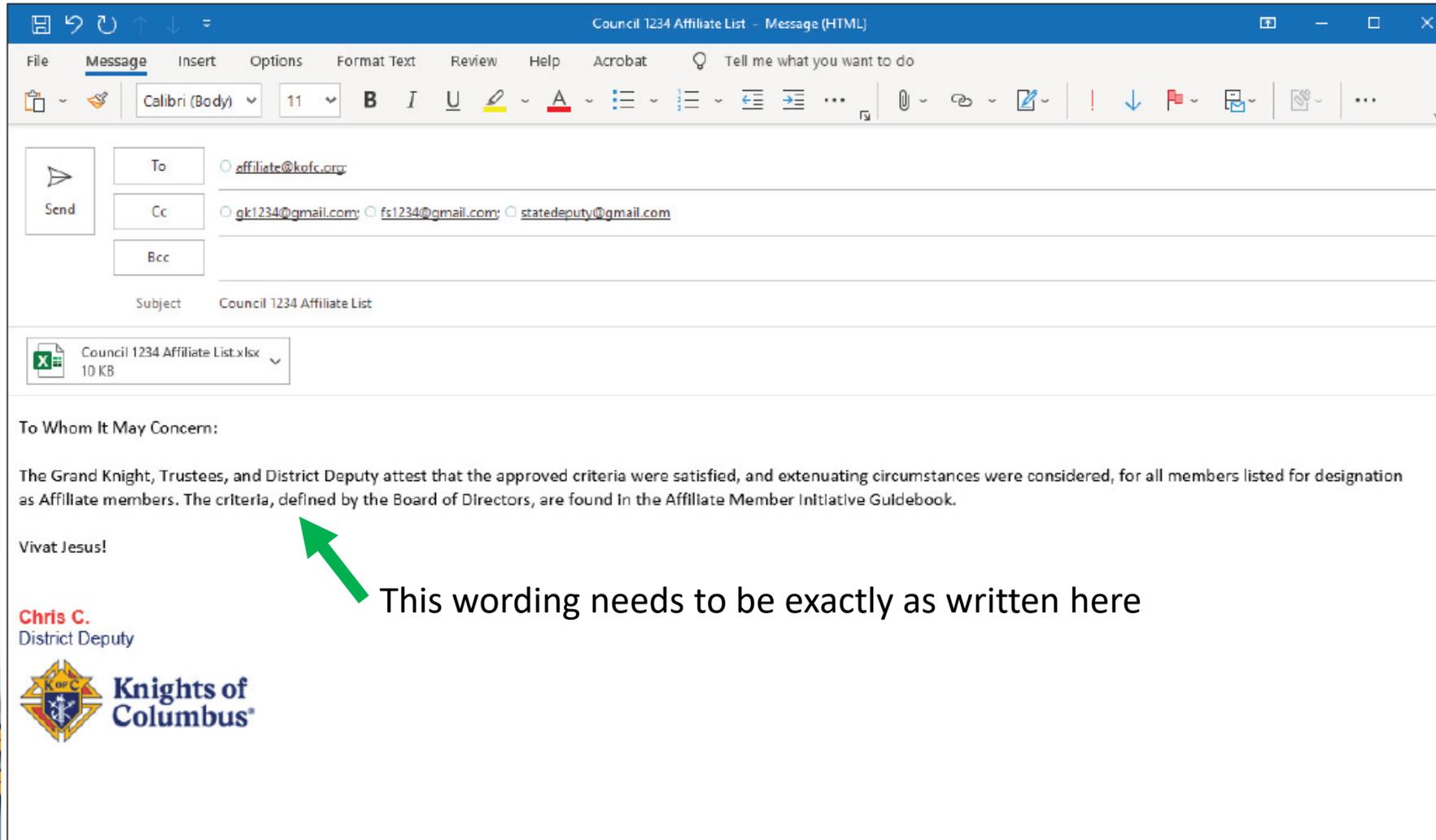
 **Knights of Columbus**

This wording needs to be exactly as written here



Affiliate Program

Figure XVII – District Deputy Email to Affiliate Mailbox



Council 1234 Affiliate List - Message (HTML)

File Message Insert Options Format Text Review Help Acrobat Tell me what you want to do

Calibri (Body) 11 B I U A

To: affiliate@kofc.org

Cc: gt1234@gmail.com fs1234@gmail.com statedeputy@gmail.com

Bcc:

Subject: Council 1234 Affiliate List

Council 1234 Affiliate List.xlsx
10 KB

To Whom It May Concern:

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.

Vivat Jesus!

Chris C.
District Deputy

 **Knights of Columbus**

This wording needs to be exactly as written here



Financial Secretaries

Treasurers

Trustees

Questions???

