

Affiliate Member Initiative Guidebook

Pilot Edition

This Guidebook is approved ONLY for use by councils selected and approved to participate in the Affiliate Membership Pilot. Jurisdictions and councils participating in the Pilot are listed below. The guidance in this book is approved ONLY for the 2021 – 2022 Fraternal Year and is superseded by successive *Affiliate Member Initiative Guidebooks*.

Affiliate Member Initiative Pilot Jurisdictions and Councils

Councils in Arizona

Councils in Connecticut

Councils in the District of Columbia

Councils in New Mexico

Councils in North Carolina

Councils in Tennessee

Military Overseas Councils

Council No. 1477

Council No. 8200

Council No. 8250

Council No. 15269

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Introduction

The Affiliate Member Initiative (AMI) respects every member. It 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 AMI Pilot is a large-scale test designed to yield important data and statistics. It is vitally important to note that the Pilot will run only for one month from October 1st to October 31st, 2021. Only councils in the below listed jurisdictions are authorized to participate:

- Arizona
- Connecticut
- District of Columbia
- New Mexico
- North Carolina
- Tennessee
- Military Overseas

The following additional councils are also authorized to participate:

- Councils No. 8200 and 15269 in Colorado
- Council No. 1477 in Indiana
- Council No. 8250 in New York

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

Councils are encouraged to participate in this exciting new initiative. Grand Knights must submit their lists to their district deputy for approval, and the district deputy must forward approved lists to the Supreme Council no later than October 31st. No late submissions will be accepted.

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 in determining the future of the Affiliate Member Initiative.

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

Council Procedures for Affiliate Designation

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:
 - o Regular dues notices were sent, and dues were not paid, and
 - o Emails were sent and ignored or bounced, and
 - o Postal mail was sent and ignored or returned undeliverable, and
 - o Phone calls were made and ignored or number not in service, and
 - o 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 nonengagement 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 nonengagement with these members.

Section 2: Affiliate Member Designation Process

- 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 below 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 below 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
- 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.
 - 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 XII)
- 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 make 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 XIII)
 - 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 XIV)
 - 5. Click on the member you want to review
 - 6. Use the menu on the left of the page to view different information
- 3. Upon completing his fraternal review and revising the list, the Grand Knight submits the final list to the District Deputy for review and approval.
 - a. The Grand Knight attaches the "Council XXXX Affiliate Recommendation List" file to an email with the following attestation:
 - "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."
 - b. The Grand Knight sends this email to the District Deputy with a copy to the State Deputy.
 - c. No lists will be accepted without the Grand Knight attestation.
- 4. 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:
 - "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 Designation Hotline: 203-752-4270

Appendix A

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

Figure I

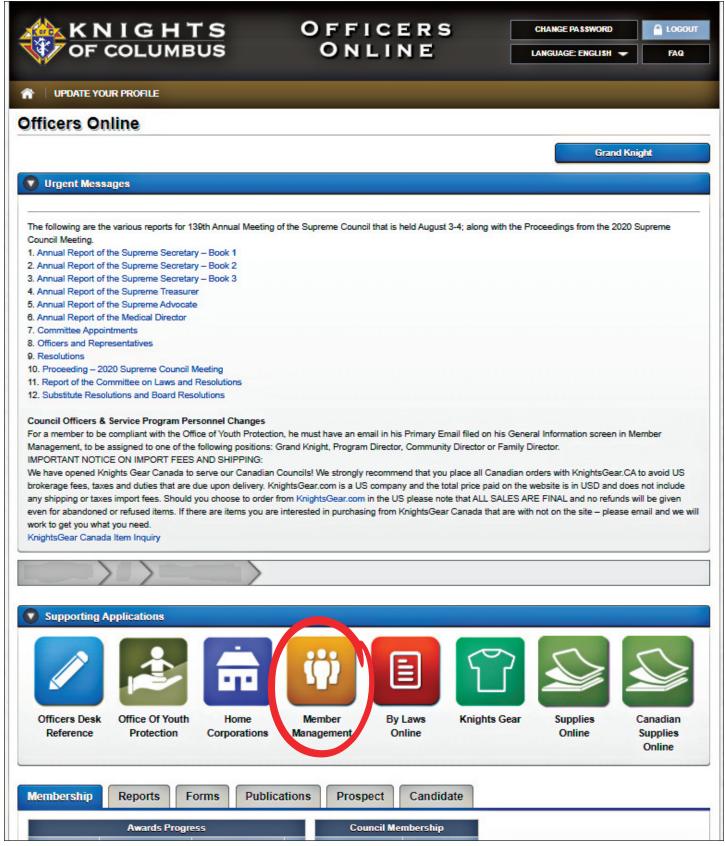


Figure II

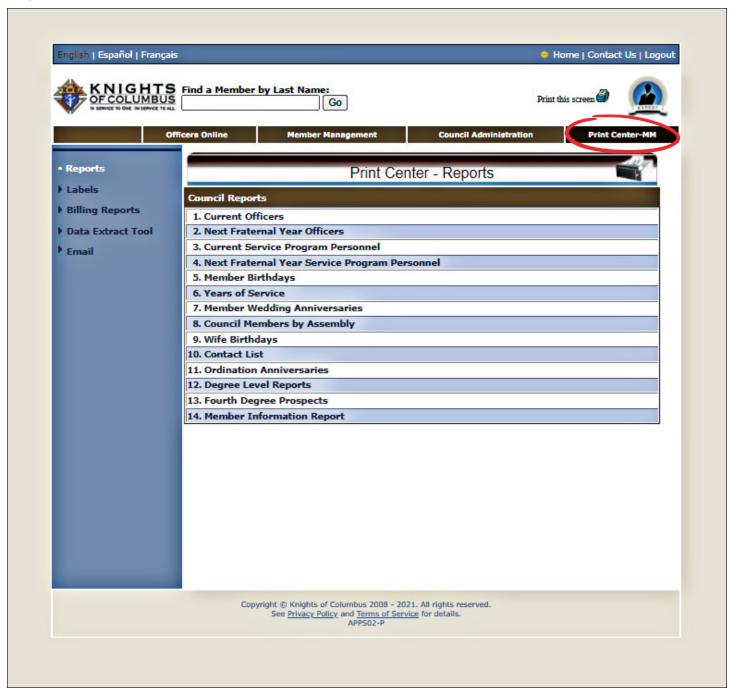


Figure III

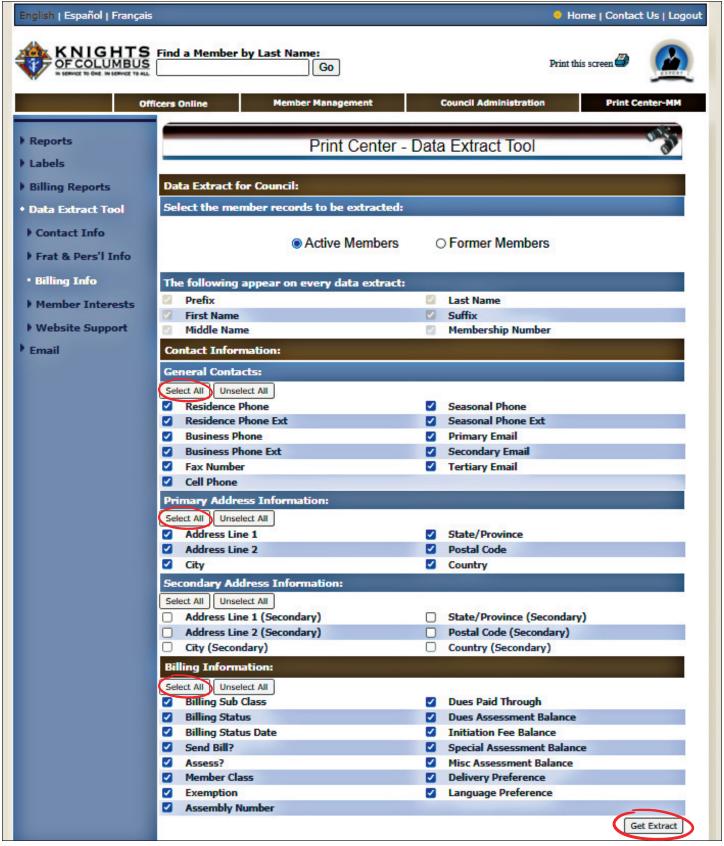


Figure IV

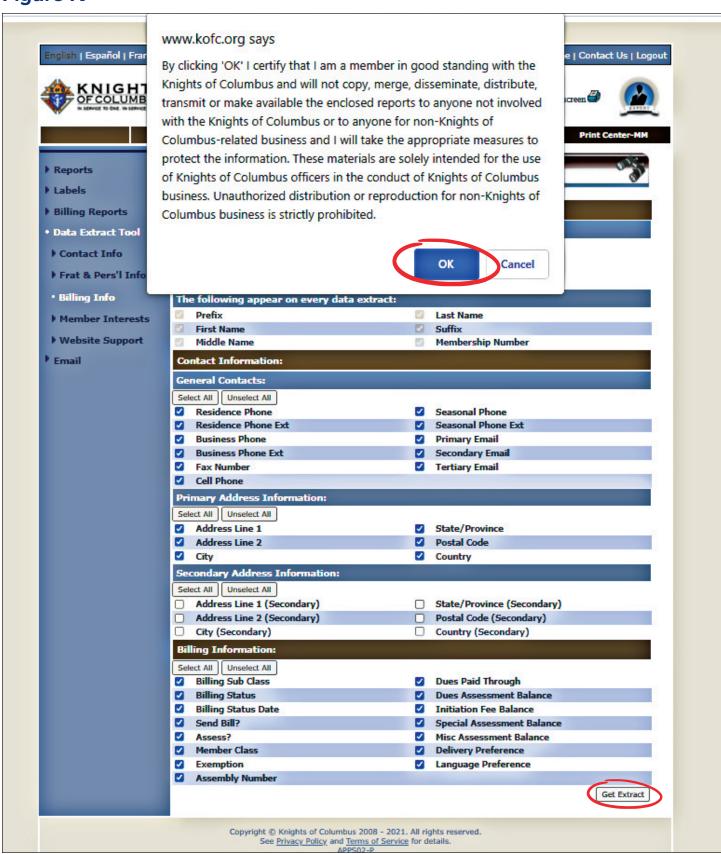


Figure V

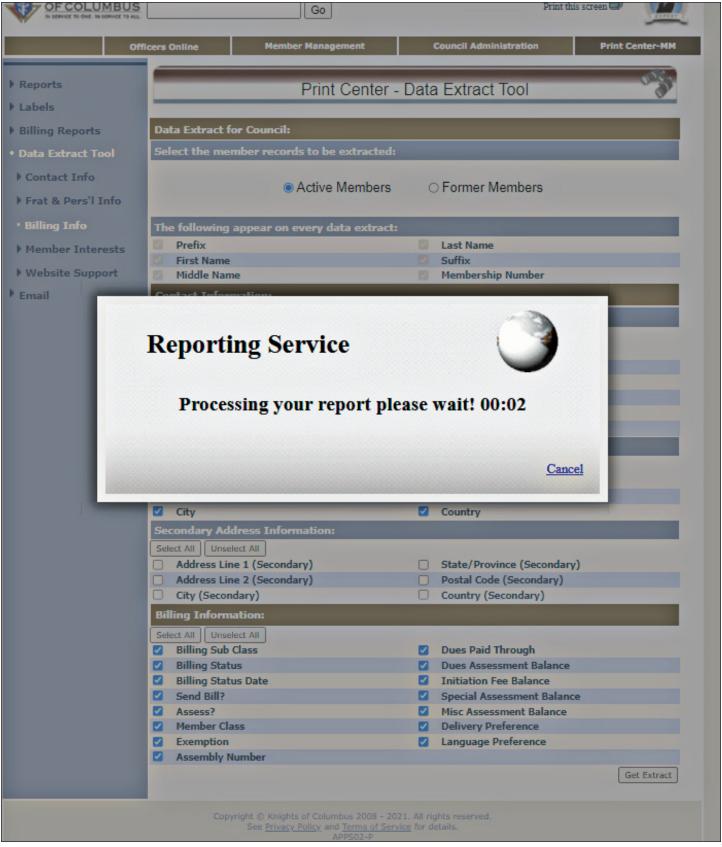


Figure VI

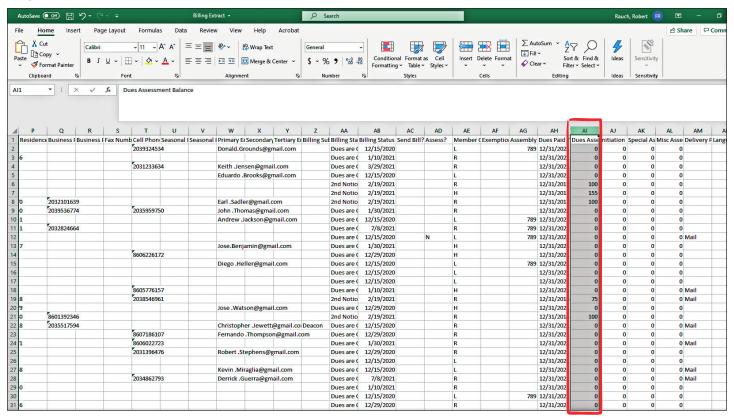


Figure VII

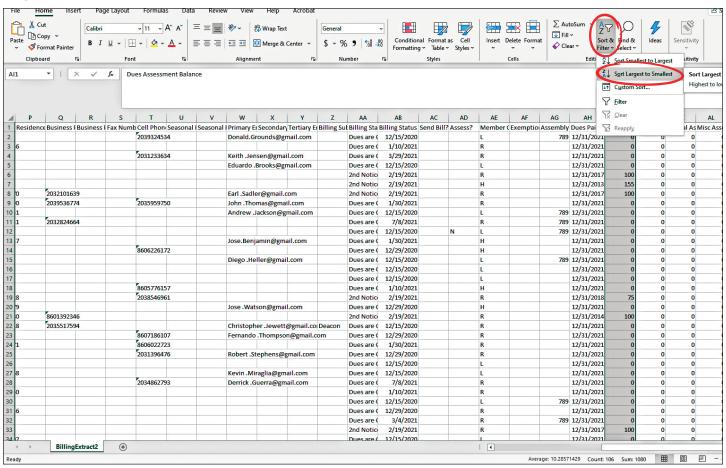


Figure VIII

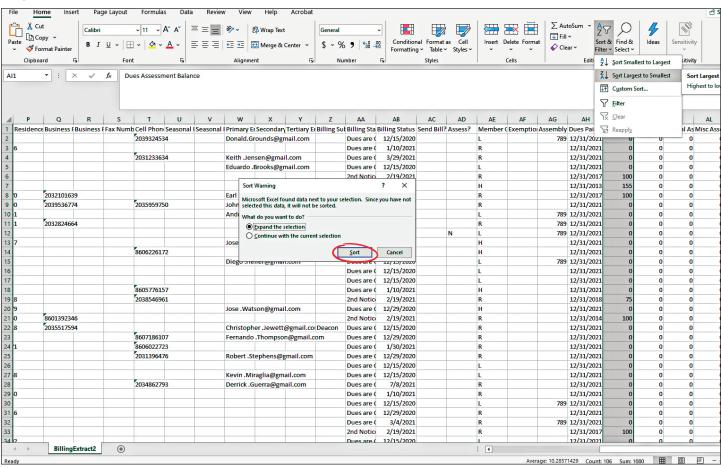


Figure IX

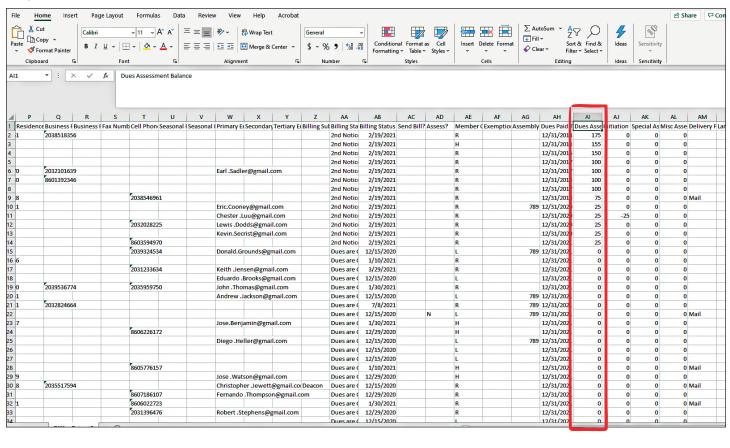


Figure X

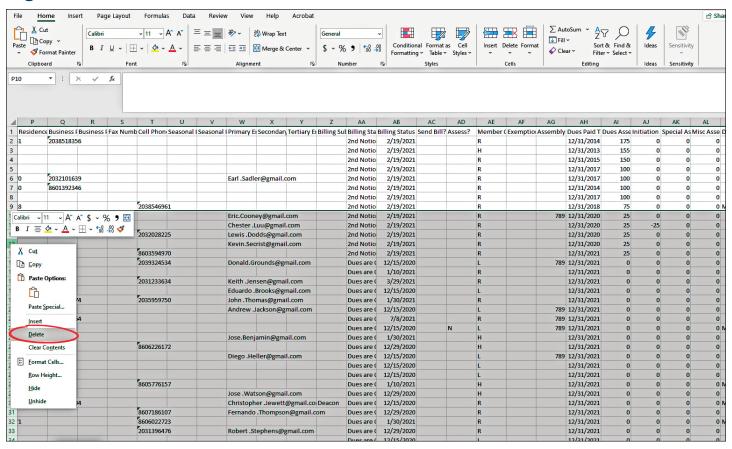


Figure XI

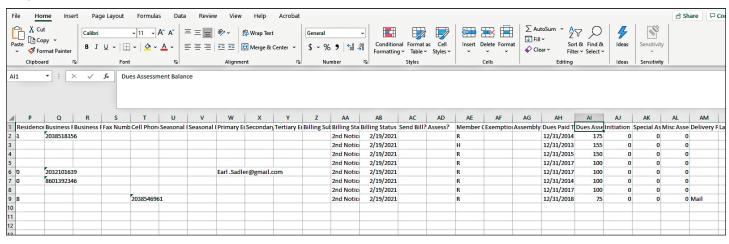


Figure XII

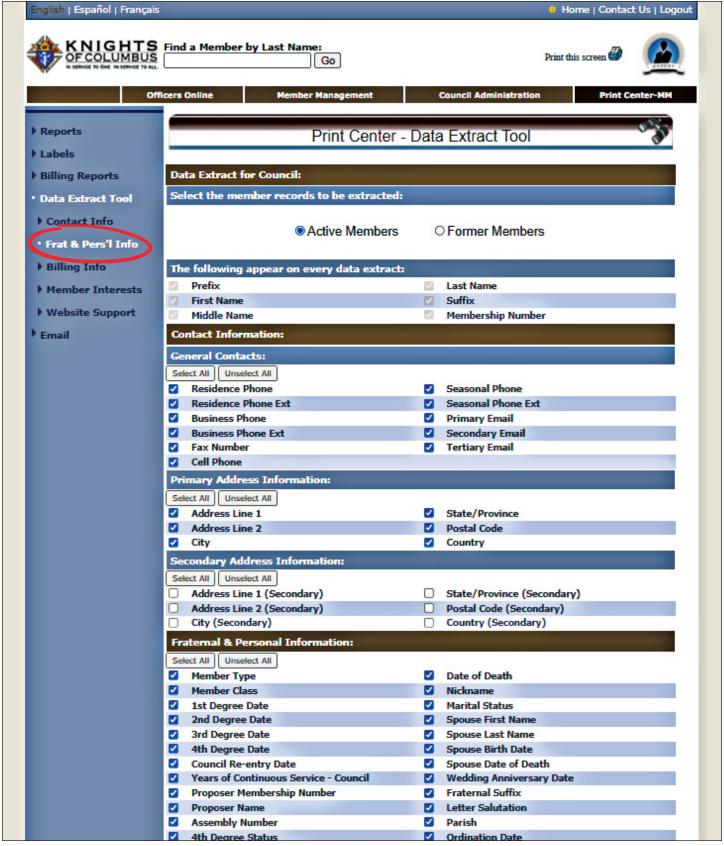


Figure XIII

- 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.

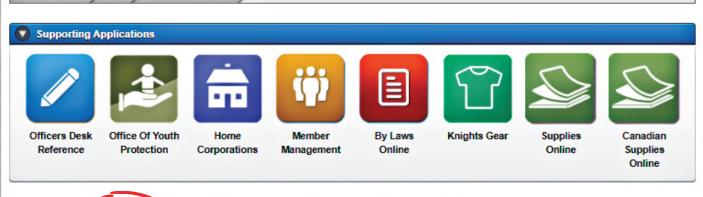
IMPORTANT NOTICE ON IMPORT FEES AND SHIPPING:

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

Membership

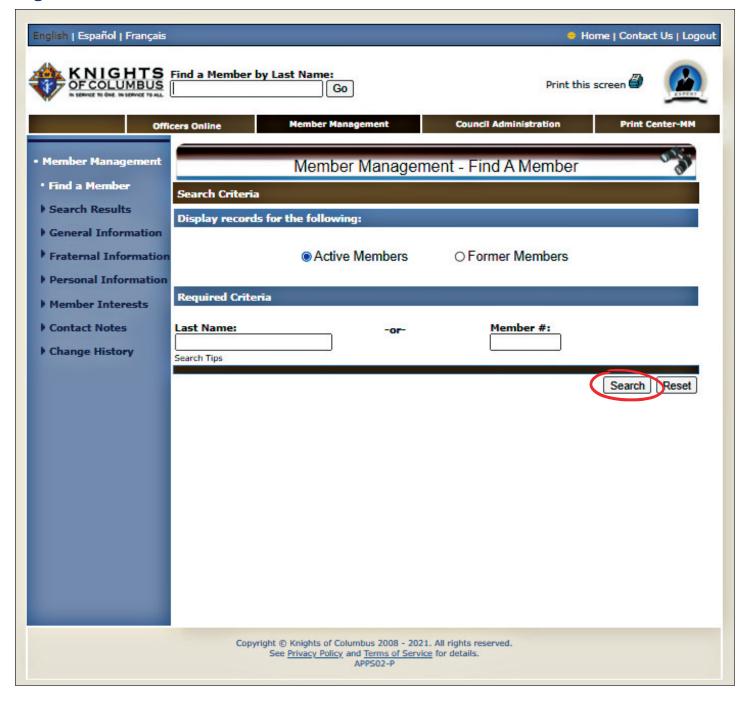




Reports Forms Publications Prospect Candidate

	Search:						
Report Name	*	Date \$	PDF .	Excel			
Membership Roster		8/17/2021	73	(4)			
Membership Roster - January		1/1/2021	73	9			
Membership Roster - July		7/1/2021	7 3	(1)			
Financial Statement		8/1/2021	73				
Safe Environment Member Status		8/17/2021		(1)			
Safe Environment Participation Rate Report		8/17/2021		a			
Council Billing Statement (Past)		7/30/2021	₩				

Figure XIV



Appendix B

KNIGHTS OF COLUMBUS AFFILIATE MEMBER INITIATIVE Member Billing Procedures (Temporary)

NOTE: These procedures are temporary and may only be used for the 2021 – 2022 Fraternal year billing cycle by the councils that participated in the pre-pilot test of the Affiliate Member Initiative (AMI). These procedures are subject to update and revision at any time.

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.
- 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.