

KNIGHTS OF COLUMBUS CALIFORNIA STATE COUNCIL



**2023-2024
DISTRICT DEPUTY**

MID YEAR MEETING

JAN 7-9, 2024
Visalia Marriott at the Convention Center

"...together we can do great things."
St. Mother Teresa



Opening display

INTRODUCTION

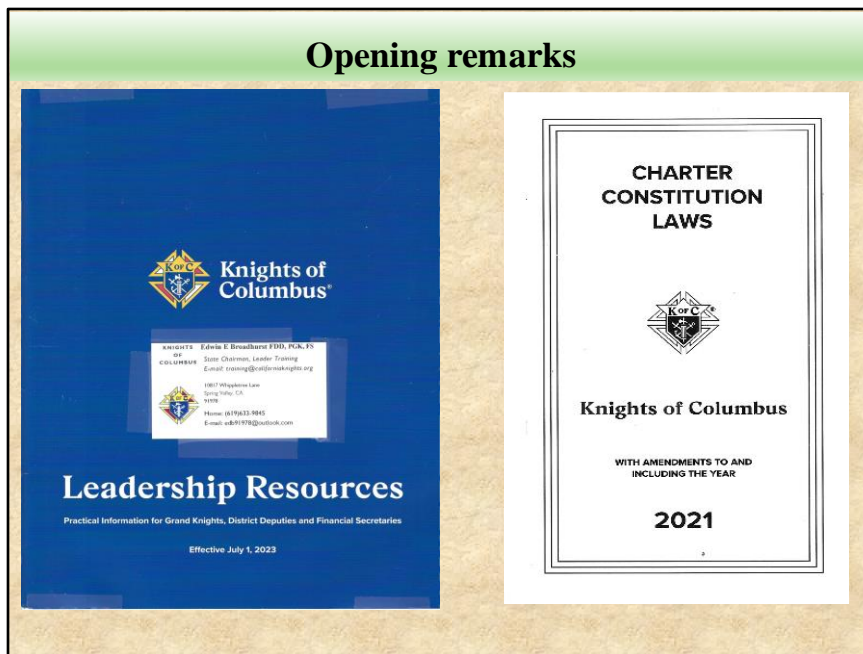
ED BROADHURST
Chairman, Leader Training
training@californiaknights.org

619 633 9845



For those of you who attended last year's mid term session that I provided, you will see this is somewhat different. I am here instead of being viewed online. But I am recording this session for those who are not able to attend. Here is my contact information and please copy this down. One of the handouts you can obtain is a copy of all the screens and dialogue from this session. We will cover a lot of material and most are displays of screens in our online applications. You will need the handouts for future reference.

Opening remarks



These two documents have been created, edited and amended for years. You should always have a copy of the CURRENT Leadership Resources pub and have read it. This most recent document explains the relationship between officers and details much of the administrative processes involved. This publication has been significantly revised this year and contains information on the Affiliate Member Initiative program. The Bylaws and the Officers Desk reference application in Officers Online give clarity to your authority as a District Deputy and you should have a good working familiarity of these publications.

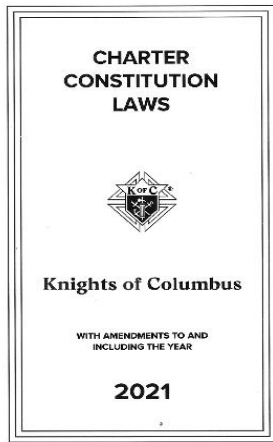
Opening remarks

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There are a couple of things in the Table of Contents in Leadership Resources Pub to comment on. The section for the District Deputy gives good guidance. Also, there is a new section on temporary billing procedures involved in the Affiliate Membership Initiative and you are directly involved in that process. Requests for Affiliate transfers will be coming to you from your councils that require your action and approval. The Member Billing application strongly supports the steps required of the council to use these billing procedures. The details must be submitted to you in a spreadsheet format for forwarding to Supreme. Submissions must be

in Supreme's hands on or before the end of the billing cycle as defined in this pub. The cycle begins Dec 15th and ends April 30th if the procedures for Affiliate Members are used.

Opening remarks



- Section 92b Declare Council office vacant
- Section 60 Appointment of Council Officer
- Section 132/Sec 243 Delivery of Books

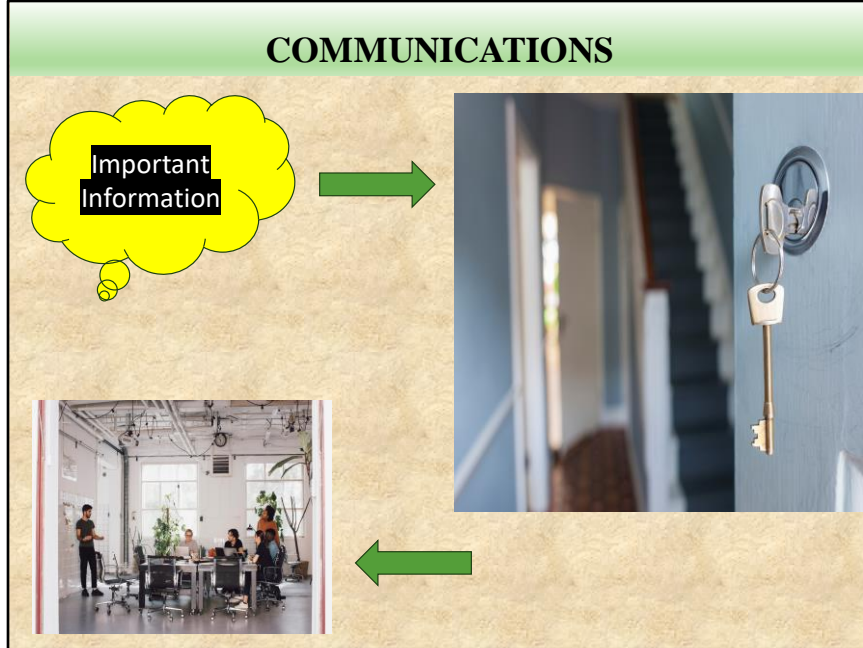
5

Here are some sections in the bylaws you need to review for familiarization with your authority and responsibilities. I recommend you write the section numbers on the back of your copy of the By-laws. Each of you have access to the Officers Desk Reference in Officers Online. This reference gives detailed information and interpretation on many bylaw topics

PURPOSE

- **COMMUNICATIONS ISSUES**
- **ADMINISTRATION OF COUNCIL REPORTING**
- **ISSUES AND ANSWERS**
- **USE OF OFFICERS ONLINE APPLICATIONS**
- **WHAT TRAINING IS AVAILABLE FOR COUNCILS**
- **Q & A if time permits**

Last year we covered forms, where you find them and what they are used for. We will have a bit of that today. However, the main points of today's session are shown here and we will talk about tools to assist you in your oversight of your councils. Just a reminder, you that you will be able to request handouts by email that will give you the details of everything covered today.



From the start of the fraternal year, the ability to communicate between Supreme, State, District and Councils is always critical if we are to be successful. If the communications door between these areas is closed and locked, it is very difficult for a council to know what our Order's goals are and how to move forward the accomplish those goals.

HOT TOPIC

TO:.....Financial Secretaries
FROM:.....Kevin P. Brady
.....Director of the General Office of the Supreme Secretary
DATE:.....October 1, 2023
RE:.....Council Statements Available Online

Please note that your council statements are available through the Order's website www.kofc.org in the Reports tab in Officers Online and can be viewed and downloaded by any officer that has access to Officers Online, when viewing council data. The following council officers have access to Officers Online: grand knights, financial secretaries, deputy grand knights, advocates, treasurers, and membership directors.

Please note that a tutorial is available at www.kofc.org/viewstatements that will guide you through the steps to access and review your council's billing statement online prior to submitting your payment for the amount due.


The Council Billing Statements contain the financial transactions for the previous month, the current outstanding balance for your council, which you are asked to pay as soon as possible, as well as membership transactions that were processed during the previous month.

cc: State Deputies
..... Regional Growth Directors

Suspension of Councils is a hot topic. Supreme's Per Capita billing statement is available in Officers Online dashboard on January 1 and remains displayed every month until it is paid. It is due upon receipt. The bill is not mailed and can only be obtained through online access. This informational letter from Supreme dated in October came at the same time as unpaid councils were being suspended. If a council is two years in arrears, they can be suspended April 10th. This letter explains that several of the council officers have access to Officers Online (if Supreme has been notified of elections) and they can obtain the billing statement to pay the bill. This

demonstrates a major reason for councils to report the elected and appointed officers and directors to Supreme promptly. Proper filing of the 185/365 is the only source from which Supreme can grant access to Officers Online. Between the April and October suspensions of this year by the end of October we had 201. We are now at 170 still suspended.

HOT TOPIC


KNIGHTS OF COLUMBUS COUNCIL STATEMENT-SUMMARY AND PAYMENT COUPON

DATE	ST	COUNCIL	LOCATION	QUOTA	GAIN	LOSS	NET	ATTAINED
01/01/23	CA	10512	EL CAJON	MEMBERSHIP	5	0	0	0
				INSURANCE	0	0	0	0

IF YOU HAVE ANY QUESTIONS REGARDING YOUR COUNCIL STATEMENT PLEASE CALL:
 FOR MEMBERSHIP (203) 752-4210
 FOR BILLING (203) 752-4392

COUNCIL STATUS: IN GOOD STANDING

SUMMARY		MEMBERSHIP BY CATEGORY				INCLUDED IN TOTAL		
MEMBER INFORMATION	DATE	ASSOC	INS	INACT	TOTAL	HON	HL	EXM
MEMBERSHIP TOTALS	01/01/23	63	25	6	94	1	29	1

SUMMARY		ACCOUNTS			
FINANCIAL INFORMATION	DATE	PERCAPITA	CATHOLIC DEV/ CULTURE OF LIFE	SUPPLIES	TOTAL
AMOUNTS DUE	01/01/23	103.00	32.00	0.00	192.00
			57.00		

SEMIANNUAL AUDIT FORM NO. 1295 DUE BY FEBRUARY 15.
 FRATERNAL SURVEY FORM NO. 1728 DUE BY JANUARY 31.
 FREE THROW PARTICIPATION REPORT FORM NO. FT-1 DUE BY JANUARY 31.

PLEASE RETURN TOP PORTION FOR COUNCIL RECORDS
 PLEASE RETURN THIS PORTION WITH PAYMENT

PAYMENT COUPON

ST	COUNCIL	LOCATION	REMIT DATE:
CA	10512	EL CAJON	01/01/23
			TOTAL AMOUNT DUE: \$ 192.00

MAIL THIS COUPON WITH YOUR REMITTANCE TO:
 KNIGHTS OF COLUMBUS-COUNCIL ACCOUNTS
 PO BOX 382172
 PITTSBURGH PA 15251-8172

80019200040105123000000001012317

How do you and the council become aware of the Supreme Per Capita owed? This bill is found under the Reports tab on Officers Online. This is the Council Billing statement. If your council is not using the online applications (and you need to know if they are or are not), it would be necessary for you to retrieve this report yourself and put it in their hands. You should view this statement monthly until it shows as paid. There have been a significant number of suspensions done this year. Council can be reinstated by payment of the arrearages.

ISSUES CAUSING SUSPENSION

- **LACK OF FUNDS TO PAY PER CAPITA**
- **LACK OF EFFECTIVE COMMUNICATIONS**
- **LACK OF TRAINING TO DEVELOP CURRENT AND FUTURE LEADERSHIP**
- **POOR BILLING ADMINISTRATION AND USE OF OFFICER ONLINE APPLICATIONS**

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There are many issues that can cause some councils to be on a downward curve and the last 3 items shown here feed into the lack of funds that can lead to suspension of the council. We want to help you identify issues and I will show you some tools available within Officer Online and Supreme's website to help you to overcome the causes of these issues.

COMMUNICATIONS

- **Elected Council Officers & Appointed Service Personnel**
- **Reports 185/365**
- **Due to be submitted by July 1**
- **Can and should be submitted online as soon as election is held**



Each year on July 1, councils are required to provide a list of newly elected officers and appointed Service personnel to Supreme, State and you. If you didn't get it, neither did they and you need to contact the council to get it resolved. The online reporting method is preferred, but manual forms are available. This report is the key that opens the door to communications between these groups. If you got a manual report from council, you should look at the discrepancy reports online to confirm Supreme has it. There can still be hangups based on legibility and accuracy in the manual reporting. Supreme does have contact with the FS by email, but at the start of the new

fraternal year, a significant number of Financial Secretaries are new to the job and might not be fully aware of their responsibility to provide the information to appropriate parties.

COMMUNICATIONS

Report of Officers Chosen for the Term July 1, 20 to June 30, 20

Council # _____ Date of Election _____ DUE BY: JUNE 30
 THIS REPORT CAN BE COMPLETED USING MEMBER MANAGEMENT
 OTHERWISE PLEASE PRINT - INDICATE MEMBERSHIP IN SQUARES

COUNCIL ADDRESS _____ CITY _____ ADDRESS NUMBER _____
 STATE _____ ZIP _____

OFFICER POSITION	NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EMAIL
Blue Pasture							
Grand Knight	Edwin E. Bradburn	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	edbradburn@overlandparkks.org	
Francis Secretary	Daniel P. Fisher	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	dfisher@overlandparkks.org	
Devic Grand Knight	UNASSIGNED						
Chairman	Gregory W. Brooks	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	gwbrosks@overlandparkks.org	
Recorder	David R. Cook	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	dcook@overlandparkks.org	
Treasurer	Alan R. Clark	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	arclark@overlandparkks.org	
Advocate	Steve Reynolds	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	sreynolds@overlandparkks.org	
Warden	David J. Zamboni	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	dzamboni@overlandparkks.org	
Inside Guard	Thomas W. Haggard	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	thaggard@overlandparkks.org	
Outside Guard	Edward P. Mason	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	emason@overlandparkks.org	
One Year Trustee	John C. Clark Sr.	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	jcc@overlandparkks.org	
Two Year Trustee	Michael J. Blachly	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	mblachly@overlandparkks.org	
Three Year Trustee	Donald L. Hovine	11200 E. 112th St.	Overland Park, KS	66204	913-241-1120	dhovine@overlandparkks.org	

Continuation on next page Page 1 of 2

Manually prepared form

SAINT LOUIS CO 1010
 EL DORADO, CA

KNIGHTS
 OF
 COLUMBUS
 Officers - 2022 - 2023

Page 1 of 2
December 24, 2022

Officer Position	Name	Address	Telephone #s	Email
Grand Knight	Edwin E. Bradburn	11200 E. 112th St. Overland Park, KS 66204	913-241-1120	edbradburn@overlandparkks.org
Francis Secretary	Daniel P. Fisher	11200 E. 112th St. Overland Park, KS 66204	913-241-1120	dfisher@overlandparkks.org
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Report to State and District
Supreme receives direct system input

The manual form on the left looks nice, but if it is not legible or accurate, there is a significant risk That Supreme will not have correct information and still may not be able to contact other council officers The report on the right can be created for State and District by printing a standard reports within Member Management application if the data has been entered electronically into Supreme’s system. It is based upon data in council’s roster and would be accurate. If you got the form on the left, you still need to confirm through Officer Online reports that Supreme has acknowledged receipt of the information. This report is how Supreme grant officers

and some appointees access to the Officers Online system.

COMMUNICATIONS

RS88M241
F185 COUNCILS NOT SUBMITTING REPORT OF OFFICERS CHOSEN FOR THE TERM

12/01/2023	CALIFORNIA		PAGE 4
00621	02184	02040	01465
01792	03482	02143	02249
02266	02382	02404	02435
02445	02466	02468	02492
02501	02507	02319	02540
02545	02550	02563	02603
02670	02741	02745	02991
03264	03370	03406	03612
03614	03637	03770	03791
03815	03930	04082	04334
04440	04128	04700	04199
04840	04882	04926	04936
04996	05042	05137	05261
05050	05736	05749	06012
06049	06234	06705	07357
07612	07334	07866	07611
07634	07930	07986	08385
08424	08409	08989	08993
09089	09080	09116	09210
09232	09314	09408	09449
09486	09512	09636	09603
09604	09724	09851	09854
09904	09951	10050	10133
10134	10133	10312	10338
10522	10528	10702	10927
11009	11176	11209	11400
11446	11440	11520	11593
11724	11854	12085	12205
12400	12636	12679	12681
12767	13182	13223	13303
13201	13202	13287	13484
13603	13620	13662	13756
13959	14020	14156	14256
14375	14499	14783	14879
14927	14930	15040	15099
15531	15038	15279	15466
15515	15632	15701	15705
15714	15735	15866	15899
15923	16009	16034	16108
16134	16176	16392	16496
16526	16573	16728	16740
16736	16770	17016	17091
17134	17285	17326	17332
17597	17739	17810	17841
17983	17988	17978	18015
18333	97004	98006	
TOTAL COUNCILS NOT REPORTING			183

RS88M241
F365 COUNCILS NOT SUBMITTING SERVICE PROGRAM PERSONNEL REPORT

12/01/2023	CALIFORNIA		PAGE 5
10694	10702	10927	11009
11041	11052	11176	11236
11269	11338	11400	11446
11465	11520	11593	11612
11724	11788	11790	11804
11854	11939	12305	12394
12400	12636	12679	12691
12694	12719	12787	13011
13124	13179	13182	13223
13263	13303	13353	13387
13484	13603	13619	13620
13642	13664	13756	13829
14026	14123	14156	14241
14355	14356	14375	14430
14499	14541	14584	14734
14783	14879	14927	14930
15002	15040	15051	15083
15099	15132	15131	15191
15344	15308	15379	15446
15494	15515	15524	15556
15583	15612	15679	15680
15701	15705	15714	15733
15735	15866	15874	15883
15899	15923	15960	16009
16034	16108	16112	16154
16176	16392	16419	16475
16488	16496	16516	16526
16570	16654	16673	16688
16738	16740	16760	16760
16770	16832	17016	17038
17091	17120	17124	17124
17242	17285	17326	17329
17322	17597	17709	17810
17841	17903	17939	17951
17968	17978	97004	98004
TOTAL COUNCILS NOT REPORTING			328

As of Dec 1, 2023 ,there are 183 councils who have not filed elected Officers information and 328 councils who have not filed a complete listing of appointed Service personnel with Supreme. This higher number is a result of councils not having filled all the required appointed positions. The obvious problem here is a break in the communications chain. Also, when we published the state roster, it lacked a lot of important detail. You need to review this report regularly and resolve the issue with the council.

ADMINISTRATION OF COUNCILS

ADMINISTRATION OF COUNCILS


Officers Online


Hi David Abbott | Last Login: 12/24/2022 at 12:13 pm Change Role: District Deputy


Urgent Messages


California > 2 Council


Supporting Applications



Officers Desk Reference


Office Of Youth Protection


Home Corporations


Knights Gear


Supplies Online


Canadian Supplies Online

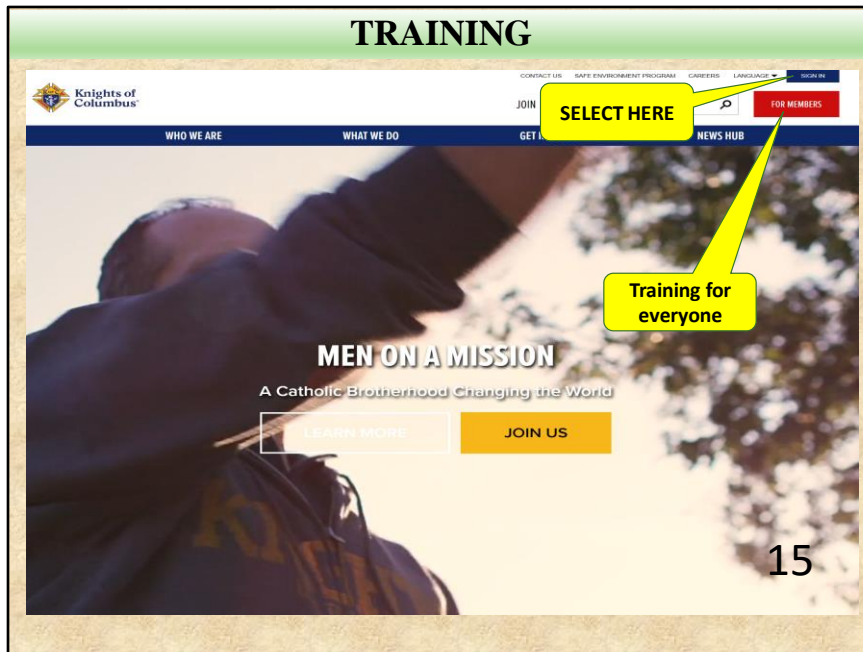
Membership Reports Forms Publications Prospect

	Awards Progress							District Membership	
	Month to Date			Year to Date				YTD Membership	YTD Change in Membership
	Quota	Gain	Loss	Net	Gain	Loss	Net	%	
MBR	20	2	0	2	5	0	5	25	432
INS	0	1	1	0	1	3	-2		

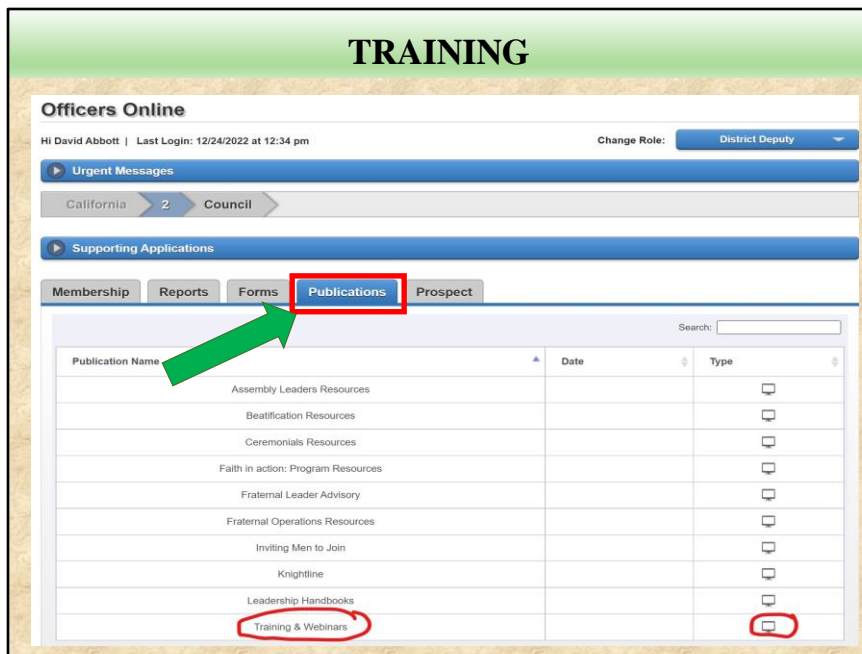
Council Billing Statement

Contact Us | Privacy Policy | Terms of Service

Here is how the online applications can assist you. Each District Deputy has access to Officers Online and should review the information tabs on a regular basis for each of your councils. Use of the reports available here can reveal issues your councils have that you will need to address throughout the year. Enter the council's number in the green box and the reports will display that council's information. The Officers Desk Reference in the yellow box provides detailed guidance in 18 major areas and bylaw interpretation. The entire reference covers a couple of hundred specific topics. Also, the hot topic Council Billing Statement mentioned earlier can be obtained from the Reports Tab.



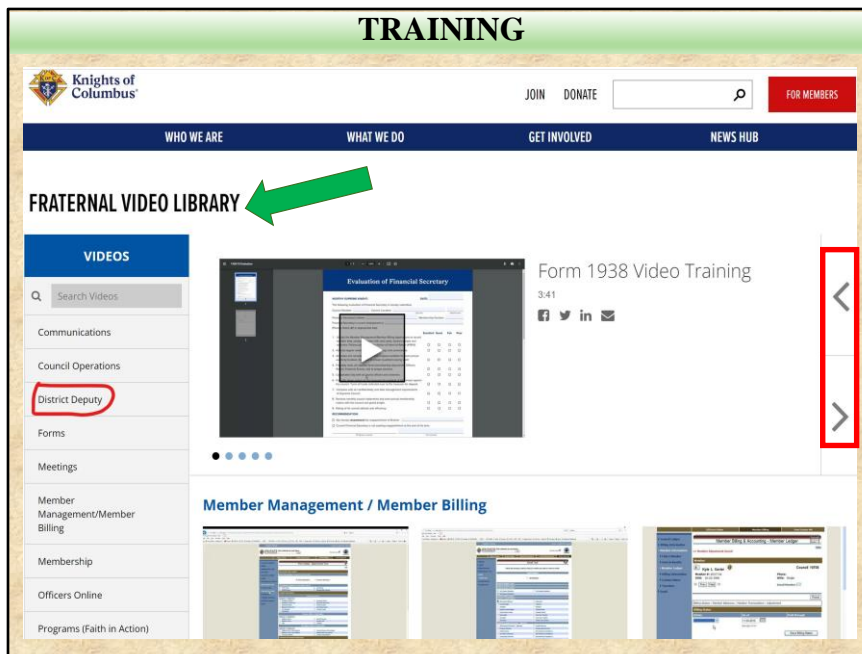
Let's go to Supreme's home page at KOFC.org for you to enter the District Deputy's Officers Online dashboard. Sign in to enter. By the way, this picture changes frequently, but the sign in area is always in the same location. The red FOR MEMBERS button provides access to all members.



There is a need for training for current and future officers. You have access online training and webinars. Your council members have the same access to those training materials on KOFC.org by using the red FOR MEMBERS tab. All need to be made aware of that information. For you to encourage them, you need to know what is available. The links are available under the Pubs tab. The circled monitor symbol will take you those sessions. There is a video for District Deputies that is a tour of all the videos. I offer a webinar for all members that will guide them to that training. The Grand Knight and Financial Secretary have similar access under the Publications Tab. I provide links to invite each new (and seasoned) Financial Secretary to introductory training when they are first appointed and throughout their terms in office. One of the handouts today is a list of 9 pre-recorded sessions available from State Training that you can share as needed to your councils.



Here is another path to Training and Webinars on Supreme's home page that you and all members can access by selecting the red "For Members" tab in the upper right-hand corner of the home page of www.KofC.org. (Remember that I told you the picture changes frequently). The Yellow arrow shows access to the training. Encouraging all members to access this material can strengthen the cadre of future officers in the council.



Let's see some of the topics available. After entering the Training and webinar tab, we selected the Fraternal Video Library option which in turn is the path to guidance on many topics and you should spend time reviewing these areas. The arrows in the red box to the right scroll through videos and shows additional categories of training. For now, let's look at a link to a video specifically for District Deputies and then we will deal with the other topics. Select District Deputy on the left to go there. As shown Under Video Library, you will see video on the preparation of Form 944 and a video tour on navigating the For Members area.

The screenshot shows a website titled "TRAINING" with a navigation bar containing "WHO WE ARE", "WHAT WE DO", "GET INVOLVED", and "NEWS HUB". Below this is the "FRATERNAL VIDEO LIBRARY" section. A sidebar on the left lists various categories: "VIDEOS", "Communications", "Council Operations", "District Deputy", "Forms", "Meetings", "Member Management/Member Billing", "Membership", "Officers Online", and "Programs (Faith in Action)". The main content area is titled "Forms" and shows "7 videos". A search bar and a "Sort: Most Recent" dropdown are also visible. The video thumbnails and titles are as follows:

- Form 1938 Video Training (3:41)
- Form 103 Video Training (3:04)
- Form 101 Video Training (3:05)
- Semiannual Council Audit (#1295) Training Video (15:29)
- Fraternal Programs Report Form (#10784) Training Video (8:48)
- Annual Survey of Fraternal Activity (Form #1728) Training Video (8:52)
- Forms 185, 186, & 365 Online Submission Training (8:48)

Two yellow callout boxes are present:

- One pointing to the "Semiannual Council Audit (#1295) Training Video" with the text: "Go here to Watch Audit video".
- Another pointing to the "Forms 185, 186, & 365 Online Submission Training" video with the text: "Go here to Watch preparation of 185/365 video".

And here is the video found by using the “For Members” or Officers Online access to the Fraternal Video Library under Forms. This 8 minute video addresses 185, 186 and 365 forms reporting that we mentioned earlier as they are all created using the exact same method in Member Management. Once viewed, the FS or GK can report to Supreme and provide the 185/365 forms to State and District in a few minutes. And, how about a better understanding of how a council audit is prepared? This one will eliminate some confusion in the councils’ network on who and how an audit is done.

contact person for the webinar training. The trainers in the chapters are for follow up assistance.

COUNCIL ISSUES & MYTHS

- **Record Keeping/Use Member Billing**
- **Timely Billing and follow-up**
- **Retention**
- **Audit**
- **Other reporting**

In order to generate income and help to retain members, the FS creates and sends the billing notices. Assessment and billings must be timely and consistent. If the Affiliate Member Initiative is to be used, there is an amended billing format. When the criteria is met, the AMI request is submitted as a spreadsheet to the DD within the billing period and the DD forwards it to Supreme for action. Details are found in the Leadership Resources pub. The FS provides the retention committee with contact info when the 2nd notice is issued. Let's debunk myth #1. The FS is responsible to contact unpaid members directly about dues payments and he is part of

the Retention Committee... Neither of these statements are correct. He is responsible for timely billing and maintaining the contact information.


RECORD KEEPING

- **Who is the Council Accountant**
- **Who performs follow-up**
- **When is it done**
- **What are the issues/concerns**

The Financial Secretary is the Council accountant. He issues billing notices and receives all funds of any kind first. Then gives funds to the Treasurer. He maintains accounting records and is responsible for all roster and contact information details. He is required to maintain records of all member indebtedness. First Notice Billing is issued on Dec 15th and 2nd notice is issued on January 15th. On that day, he provides contact information to the Grand Knight and Retention Chairman for the Retention committee to make contact efforts. These steps are shown in the Leadership Resources publication. The chairman will direct the follow-up until issues are

resolved.

RETENTION COMMITTEE REPORT


Page 1 of 1

Retention Committee Report

Members in Danger of Being Suspended

Member Information	Amount Due	Status	Contact Notes
Marty J 14000 Yuhalla Pl El Cajon, CA 92021-3748 Res Phone: (619) 441-8915 Cell Phone: (619) 441-6558 11406 Shadow Ranch Rd Lakeview, CA 92024	50.00	Knight Alert	Date: ___/___/___ Email: [redacted] Proposer: Clark Sr, John C Proposer Tel #: [redacted]
Jeffrey Res Phone: [redacted] Cell Phone: [redacted]	25.00	Knight Alert	Date: ___/___/___ Email: [redacted] Proposer: [redacted]
Donald H 10000 Riva Rd, CA CA	50.00	Knight Alert	Date: ___/___/___ Email: [redacted] Proposer: [redacted]
Andrew B Res Phone: [redacted] Cell Phone: [redacted]	50.00	Knight Alert	Date: ___/___/___ Email: [redacted] Proposer: [redacted]
Martin J 6249 Montebello St CA 92069	50.00	Knight Alert	Date: ___/___/___ Email: [redacted] Proposer: [redacted]
Andrew P Res Phone: [redacted] Cell Phone: [redacted]	50.00	Knight Alert	Date: ___/___/___ Email: [redacted] Proposer: [redacted]

This is the retention committee report given to the committee at 2nd notice level. It provides contact information, details on amounts owed and billing status. The Chairman distributes this to his committee members, and they use it to advise of their efforts made and issues involved. The chairman can return it to the FS for information.

RECORD KEEPING

- ▶ Transfers
- ▶ Email

Billing Status | Member Balances | Member Transactions | Adjustment

Billing Status	
Status	As of
Dues are Current <input type="button" value="v"/>	01-06-2022 <input type="text" value="MM-DD-YYYY"/>
	12-31-2022 <input type="text" value="MM-DD-YYYY"/>

Billing Status | Member Balances | Member Transactions | Adjustment

Member Balances				
Dues	Initiation Fee	Special	Miscellaneous	Total
0.00	0.00	0.00	0.00	0.00

Billing Status | Member Balances | Member Transactions | Adjustment

Member Transactions					
Date	Transaction Type	Tran #	Account: Sub Account	Amount	Void
12-17-2021	Receipt	1924	Receivable: Special	(2.15)	<input type="checkbox"/>
12-17-2021	Receipt	1924	Receivable: Dues	(50.00)	<input type="checkbox"/>
12-15-2021	Assessment	16	Receivable: Dues	50.00	<input type="checkbox"/>
11-26-2021	Assessment	17	Receivable: Special	3.65	<input type="checkbox"/>
04-18-2021	Adjustment- Forgiven	15	Receivable: Special	(1.50)	<input type="checkbox"/>
03-10-2021	Adjustment	238	Receivable: Special	(1.50)	<input type="checkbox"/>
01-04-2021	Receipt	1842	Receivable: Special	(5.00)	<input type="checkbox"/>
01-04-2021	Receipt	1842	Receivable: Dues	(50.00)	<input type="checkbox"/>
01-01-2021	Assessment- Forgiven	15	Receivable: Special	1.50	<input type="checkbox"/>
01-01-2021	Assessment	14	Receivable: Special	5.00	<input type="checkbox"/>

Next >>

Billing Status | Member Balances | Member Transactions | Adjustment

Adjustments

Here is a screen print of a ledger card that is created in Member Billing. If the FS is using Member Billing and recording receipt of payment dues in the application, this screen will exist with current information. If not used, this screen will not be up to date and the FS should not be graded as using Member Billing. When an FS is evaluated for renewal of his 3 year term, this is part of his evaluation and the DD has to sign the recommendation.

RECORD KEEPING

Outstanding Balance Report
 Page 2 of 2
 December 06, 2023

Member Name	Billing Status	Amount Due
[REDACTED] Kennedy	1st Notice	40.00
[REDACTED] Kyla E.	1st Notice	40.00
[REDACTED] Brennan C	1st Notice	135.00
[REDACTED] Paul	1st Notice	40.00
[REDACTED] Tim J	1st Notice	80.00
[REDACTED] Brian C	1st Notice	40.00
[REDACTED] Joseph A	1st Notice	40.00
[REDACTED] Ronald W	1st Notice	40.00
Total Members:	54	Total Outstanding: 5,385.00

TRAINING

25

This is the last page of an Unpaid Balances report available in Member Billing. This report created on December 6th of the current year shows that this council is not doing consistent billing and recording payments made. All members listed here are still at 1st Notice status in December. The first page of this report listed members owing 4-5 years dues. This report clearly show a significant issue in retention efforts. This report and lack of documentation of members indebtedness standing clearly demonstrates the need for training in a council. For example, if you divide the total owed by # of members (54) by a one year's dues amount (\$40), the

average arrearage is almost 3 years.

FORMS

[UPDATE YOUR PROFILE](#)

Officers Online

Hi David Abbott | Last Login: 12/27/2022 at 10:28 pm Change Role: District Deputy

[Urgent Messages](#)

Callform: 2 [Council](#)

[Supporting Applications](#)


Membership
Reports
Forms
Publications
Prospect

Search:

Form Name	Form Number	Due Date	Print	Online
Application for Appointment as Financial Secretary	101	As Needed		
Application for Council Charter	137	As Needed		
District Deputy Annual Report	944	9/15		
District Deputy Expense Form (Kilometers)	267DDK	As Needed		
District Deputy Expense Form (Miles)	267DDM	As Needed		
Evaluation of Financial Secretary	1938	As Needed		
Nomination for Appointment as Financial Secretary	103	As Needed		
Notice of Institution of a Council	136	As Needed		
Notice of Intent to Establish a Council	133	As Needed		

Let's talk about forms for a bit. From your dashboard, click on forms and select what you want. If you click on your District number (in the red box), you will be shown your forms. If you click on the council tab, you will see council forms

FORMS



[CONTACT US](#)
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FOR MEMBERS

WHO WE ARE
WHAT WE DO
GET INVOLVED
NEWS HUB

COUNCIL FORMS

Please submit online form whenever available. This is the preferred method of submitting forms. When an online form is not available, print out a copy of the form before submission and keep it for your records. Remember that some of the forms go to different departments within the Supreme Council. Once the form is completed, please verify the email address on the form before sending.


Form Number	Council Form Name	PDF	Online (Preferred Method)	Due Date
#395	Service Program Personnel Report	PDF	Online (Preferred Method)	7/1
#1295	Semiannual Council Audit	PDF	N/A	2/15
#1295	Semiannual Council Audit	PDF	N/A	8/15
#1728	Annual Survey of Fraternal Activity	PDF	Online (Preferred Method)	1/31
#185	Report of Officers Chosen for the Term	PDF	Online (Preferred Method)	6/30
#SP-7	Columbian Award Application	PDF	Online (Preferred Method)	6/30
#101	Application for Appointment as Financial Secretary	PDF	N/A	As Needed
#103	Nomination for Appointment as Financial Secretary	PDF	N/A	As Needed

FORMS

- COUNCIL FORMS
- COUNCIL DEVELOPMENT FORMS
- DISTRICT FORMS
- STATE FORMS
- ASSEMBLY FORMS
- FAITH IN ACTION PROGRAM FORMS

Or if you come through the red “For Members” tab instead of your dashboard. You then Select District Forms . And, ...

FORMS



[CONTACT US](#) | [SAFE ENVIRONMENT PROGRAM](#) | [CAREERS](#) | [LANGUAGE](#) | [SIGN IN](#)


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[WHO WE ARE](#) | [WHAT WE DO](#) | [GET INVOLVED](#) | [NEWS HUB](#)

DISTRICT FORMS

Please submit online form whenever available. This is the preferred method of submitting forms. When an online form is not available, print out a copy of the form before submission and keep it for your records. Remember that some of the forms go to different departments within the Supreme Council. Once the form is completed, please verify the email address on the form before sending.

Form Number	District Form Name	PDF	Online (Preferred Method)	Due Date
#944 District	District Deputy Annual Report	N/A	Online (Preferred Method)	9/15



Form Number	Expense Form Name	PDF	Online (Preferred Method)	Due Date
#267DD	District Deputy Expense Form	PDF	N/A	Quarterly
#267DD (Canada)	District Deputy Expense Form (Canada)	PDF	N/A	Quarterly

Rules relating to expense accounts are listed on page two of the files listed above.
Any questions concerning Expense forms should be directed to: General Office Department, 1 Columbus Plaza, New Haven, CT 06510-3326 or (203) 752-4034.

FORMS

- COUNCIL FORMS
- COUNCIL DEVELOPMENT FORMS
- < DISTRICT FORMS
- STATE FORMS
- ASSEMBLY FORMS
- FAITH IN ACTION PROGRAM FORMS

Whichever path you take, having selecting District forms, this is what you see. Please note that the Form 944 can be filed only online. This is a good time to caution you that if you just go to Kofc.org and do a general search you can come up with outdated forms. So, only use your dashboard or the red For Members button to get those items. Now, let's go to Reports...

REPORTS			
Hi David Abbott Last Login: 12/24/2022 at 12:13 pm		Change Role: District Deputy	
Urgent Messages			
California 2 Council			
Supporting Applications			
Membership	Reports	Forms	Publications
Prospect			
Search: <input type="text"/>			
Report Name	Date	PDF	Excel
District Deputy's Report	12/1/2022		
Conservation Listing by District (Past)	12/22/2022		
Daily Circle of Honor & Membership Goals Report	9/1/2022		
Safe Environment Member Status	12/20/2022		
Safe Environment Participation Rate Report	12/20/2022		
Councils not submitting Officers Chosen for Term Report (185)	12/23/2022		
Councils not submitting Service Program Personnel Report (365)	12/23/2022		
Councils not submitting Semiannual Audit Report (1295)	12/22/2022		
Councils not submitting Annual Survey of Fraternal Activity (1728)	5/27/2022		30
Councils not submitting Columbian Award Application (SP-7)	7/16/2022		

We are back on your dashboard so let's cover some reports. If your councils are not filing reports or on time, you need to get involved. Councils need to understand the reasons for the reports and be familiar with how they are created. The reports shown here are your key tools in your oversight of your councils. You need to review this area on a regular basis. We covered the 185/365 reports due on July 1 each year. If there was a change in DDs they probably didn't know who you are or how to contact you. You should consider following with your councils in late June to obtain that information. Elections should have been held by June 16th. Your initial effort can make

a dramatic impact on early communications to other officers by Supreme and State. I hate to mention this, but I frequently interact with members who do not know the name of the Chapter their council is in.

Forms 1265 Semi-annual Audits

- Due Aug 15th and Feb 15th
- Failure to comply effects FS and Treasurer Bonding
- Video of Who and How audits done is available on Supreme website

Now let's discuss bonding and audits. Coverage under the Officer Bonding Program is only available to Local Councils, and Assemblies that have completed and submitted their two most recent Semi-Annual audits to the Council Accounts Department at the Supreme Office. This bonding is for the office and is to protect the council or assembly against losses resulting from misconduct by these officers. Let's debunk Myth #2. Is it ok for the Financial Secretary or the Treasurer to complete the audit form for the review of the Trustees and Grand Knight. The answer is NO! The Trustees must prepare the audit on the form by reviewing the

actual books. The Audit must be signed by GK and at least two Trustees. Remember our earlier comment on your authority to view the council's books. You may find that there are some councils that have no books if Member Billing is not being used for accounting.

FORMS 1265 SEMI-ANNUAL AUDITS

ZSBMM275
RUN DATE: 12/01/2023

CALIFORNIA
COUNCIL
NUMBER STATUS CITY
STATE: CALIFORNIA

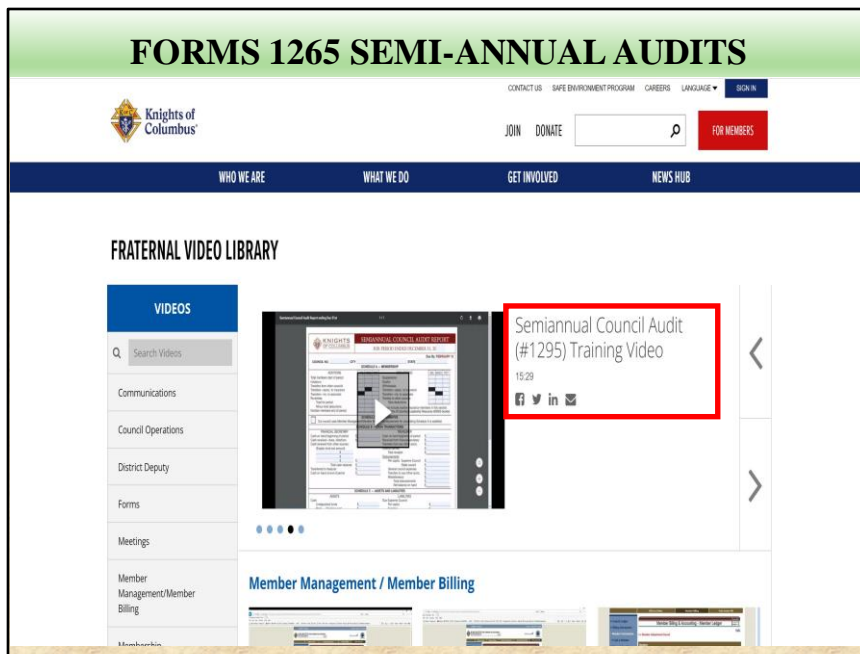
DELINQUENT SEMI-ANNUAL COUNCIL AUDIT REPORTS FOR PERIOD ENDED 06/30/2023 DUE BY 08/15/2023

	LAST REPORT DUE PERIOD RECEIVED
NUMBER OF COUNCILS REQUIRED TO REPORT	730
COUNCILS INSTITUTED AFTER REPORT PERIOD	3
TOTAL NUMBER OF COUNCILS	733
COUNCILS DELINQUENT THIS PERIOD:	314
COUNCILS REPORTING THIS PERIOD:	339
COUNCILS INSTITUTED AFTER REPORT PERIOD	3
TOTAL NUMBER OF COUNCILS	733
PERCENTAGE OF COUNCILS DELINQUENT:	53%
COUNCILS DELINQUENT LAST 2 PERIODS:	314
COUNCILS DELINQUENT ONLY LAST PERIOD:	77
TOTAL NUMBER OF DELINQUENT COUNCILS:	391
NUMBER OF COUNCILS WITHOUT A RECEIVE DATE:	39

* LAST 2 REPORTS ARE DELINQUENT

STATUS CODES: A = ACTIVE S = SUSPENSION P = PENDING SUSPENSION

This slide shows the last page of the report of councils who are not current with audits. The report includes inactive councils. There are 314 delinquent councils and you should monitor this report regularly. The By-laws of the Order empower the you to demand delivery of the books and financial records for examination. You can also select persons to assist in performing the audit. The decision by the District Deputy as to who will assist is dependent on circumstances.



Since you have now seen how to access videos on Supreme’s website, the video addresses significant issues in the preparation of council semi-annual audits. Many of you have councils that are in arrears for two or more audits and there are some misconceptions in the councils as to why and how an audit must be conducted. This video states that the FS and Treasurer are not to be in the room for the preparation of the audit and the Trustees are to complete the audit form under the guidance of the GK and based upon the financials/books/receipts of the council provided by FS and Treasurer. The FS and Treasurer should be available to answer questions or

address issues. Having the FS or Treasurer simply complete this form for signature is not an audit and is not acceptable.

FORMS 1265 SEMI-ANNUAL AUDITS

Semiannual Council Audit Report
For Period Ended June 30, 20

Council No: _____ City: _____ State: _____
DUE BY: AUGUST 15

SCHEDULE A – MEMBERSHIP

	ADDITIONS		DEDUCTIONS	
	IND.	ASSO.	IND.	ASSO.
Total members start of period				
Initations			Deaths	
Transfers from other councils			Withdrawals	
Transfers—assoc. to insurance			Transfers—assoc. to insurance	
Transfers—ins. to associate			Transfers—ins. to associate	
Re-entries			Transfers to other councils	
Total for period			Total deductions	
Minus total deductions			Do not include inactive insurance members in this section.**	
Number members end of period				

SCHEDULE A – ALTERNATIVE

Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B – CASH TRANSACTIONS

FINANCIAL SECRETARY		TREASURER	
Cash on hand beginning of period	\$ _____	Cash on hand beginning of period	\$ _____
Cash received—dues, initations	\$ _____	Received from financial secretary	\$ _____
Cash received from other sources:		Transfers from sav/other accts.	\$ _____
(Explain kind and amount)		Interest earned	\$ _____
\$ _____		Total receipts	\$ _____
\$ _____		Disbursements	\$ _____
\$ _____		Per capita—Supreme/Council	\$ _____
Total cash received	\$ _____	State council	\$ _____
Transferred to treasurer	\$ _____	General council expenses	\$ _____
Cash on hand at end of period	\$ _____	Transfers to sav/other accts.	\$ _____
		Miscellaneous	\$ _____
		Total disbursements	\$ _____
		Net balance on hand	\$ _____

SCHEDULE C – ASSETS AND LIABILITIES

ASSETS	LIABILITIES
Cash:	Due Supreme Council
Undeposited funds	Per capita
Bank – Checking acct.	Supplies
– Savings acct.	Graphic advertising
– Money market accts.	Other
Due from _____ members	Due state council
Total current assets	Advance payments by _____ members
Less:	Misc. liabilities
Liabilities	
Net assets	
CD	
Annual Funds	
Misc. assets	
Total other assets	
Total assets	Total current liabilities

Please complete all items. Insert "None" where no figures are to be shown.

Signed this ____ day of _____ 20__

_____ Grand Knight
 _____ Trustee
 _____ Trustee
 _____ Trustee

SEND ONE COPY TO: Council Accounts
 Email: councilaccounts@kilo.org
 Fax: 855-228-1396
 Mail: 1 Columbus Plaza, New Haven, CT 06510

COPIES TO: State Deputy, District Deputy, Council File

*All U.S. Councils must file form 990 with IRS annually. For info email taxassistant.org or refer to Officer's Desk Reference.
 For more details, see Knights of Columbus Leadership Resource (P5093) booklet.

Page 1 of 2
Page 2 of 2

Myth #3. It is ok to leave these two fields pertaining to unpaid and prepaid dues blank. Again, the answer is NO! I want to point out an area that is frequently “overlooked”. The FS is required to maintain a record of the indebtedness of a member. If a council is owed and billing for multiple years unpaid dues, the total of those dues being billed and not paid must be reported as an asset and prepaid dues reported as a liability. If the assets field is blank, the audit is stating that the prior years’ dues have been waived. If so, the members’ records should reflect those dues as having been waived. If the FS is not using Member Billing to create notices and not using it to

record dues paid, any alternate method used must contain that information to be in compliance with Supreme's bylaws. The video will show the GK and Trustees the steps involved.

FORM 1938 FS EVALUATION

- FS Evaluation required for renewal
- Due when FS is at end of 3-year term
- GK and Trustees Signature required
- Form states DD and SD required if not recommended for renewal
- Supreme requires DD & State Deputy signature if form is delinquent

35

Councils will be advised by Supreme when the Financial Secretary renewal evaluation is required. It must be completed before the end of the 3-year term and submitted to Supreme by then. The proper evaluations of the current Financial Secretary help in the decision of renewal. Renewal of the FS in office will not be granted until the form is on file with Supreme. If you have doubts on accuracy whether the FS using Member Billing, contact State Training Chairman for assistance.

FORM 1938 FS EVALUATION

Evaluation of Financial Secretary

WORTHY SUPREME KNIGHTS: _____ **DATE:** _____

The following evaluation of Financial Secretary is hereby submitted.

Council Number: _____ Council Location: _____ Ex/Fin: _____ Treasurer: _____

Financial Secretary's Name: _____ Membership Number: _____

Financial Secretary's current employment is: _____
(Place a check (✓) in appropriate box)

1. Use of the Member Management/Member Billing Application to record member data, produce member bills and cards, record receipts and vouchers. Followed up on by the Office of Grand Knights (OSG)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. All books and records available and in good condition for semi-annual audit by treasurer. Followed up on by the Office of Grand Knights (OSG)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Promptly mails all required forms (membership documents, Officers' Names, Fraternal Survey) and to proper persons.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Cooperates fully with all council officers and members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Promptly draws orders on the treasurer for payment of bills owed against the council. Turns all funds collected over to the treasurer for deposit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Complies with all confidentiality and data management requirements of Supreme Council.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Shows monthly council activities and semi-annual membership rosters with the council and grand knights.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Rating of his overall attitude and efficiency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

RECOMMENDATION:

We hereby recommend the reappointment of Brother _____

Current Financial Secretary is not seeking reappointment at the end of his term.

If you are unsure: _____

We do not recommend the reappointment of Brother _____

For this nomination, please include when the Financial Secretary's term should end: _____

Page 1 of 2

Treasurer for One Year _____	Sign in Blue Ink	#142
Treasurer for Two Years _____	Sign in Blue Ink	#143
Treasurer for Three Years _____	Sign in Blue Ink	#144
Grand Knight _____	Sign in Blue Ink	#145
State Deputy _____	Sign in Blue Ink with the Recommendation	#146
State Deputy _____	Sign in Blue Ink with the Recommendation	#147

Forward to: Knights of Columbus
Financial Secretary Div.
P.O. Box 854
Elmhurst, NY 11023-9906

Alternatively, you may email this completed and signed form to financial.secretary@kco.org
OR fax to (203) 752-4814.

Page 2 of 2

Item 1 on the FS evaluation is the use of Member Management/Billing applications. It includes recording receipts and vouchers, billing, receipt of dues and retention support. The FS is responsible for filing most of the forms we are discussing today and if the council is delinquent on submission of these forms and reports, it is difficult to justify Good or Excellent grade on these issues. The practice of the Treasurer serving as the council accountant would require a Poor grade on item 1. There is a new procedure that started in the past year. If the FS Evaluation review is delinquent, the DD and the State Deputy must also sign the form. Supreme sends

notices to the State Deputy of delinquent evaluations. State Training can provide information on the level of use of systems and participation in training we offer to the member. The response and Evaluation should be sent to State Deputy for signature after the DD has signed and not directly to Supreme.

APPLICATION FOR APPOINTMENT AS FS

- Application for Appointment of FS
- Completed by Candidate
- Term in Office is 3 years
- Candidate agrees to serve until replaced

I have added these comments to the presentation as a reminder to District Deputies to mentor councils in finding the right candidate and not just fill the position. All of us have a responsibility to strongly encourage the use of online systems and the applications by council. As you have seen on the evaluation form, the use of online systems is a key factor in retention decisions. Although the Worthy District Deputy and Worthy State Deputy are not required to sign the renewal form unless a negative recommendation is made, much can be done to make the right decision in the initial appointment. These past few years, the training offered to new Financial Secretaries

seems to reduce the number who leave the office before completing the 3-year term and we also appear to have a larger number who stay beyond that first term. There seems to be a positive reaction to having access to trainers on issues.

FORM 1728 SURVEY OF FRATERNAL ACTIVITY

- Annual Survey of Fraternal Activity
- Due Jan 31st for previous year
- Covers Jan 1 through Dec 31

The annual Fraternal Activity survey is a Star Council issue and when combined with other councils in the Order, it is a powerful testament to the level of Charity and efforts in our order. Councils should proudly extol the virtues of their efforts. Yet, it is difficult to get individual members to respond with the individual Member Worksheet. The individual activity sheet should be sent with billing notices and every effort should be made to encourage timely responses.

**KNIGHTS OF COLUMBUS
CALIFORNIA STATE COUNCIL**



QUESTIONS & HANDOUTS

Ed Broadhurst

training@californiaknights.org

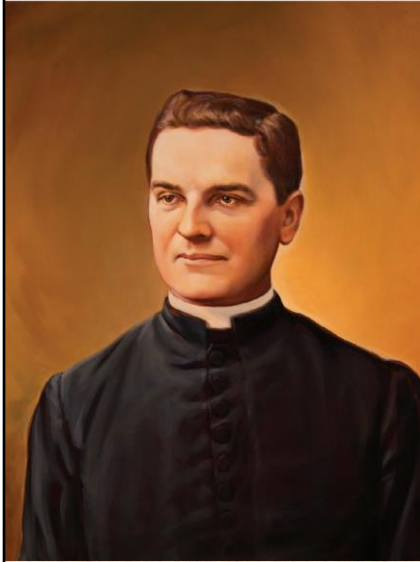
619 633 9848



State Training offers training in several aspects of council duties. You have a list of our recorded sessions that you can share with your councils' members. We offer direct contact in each chapter with experienced trainers. Our training is by online sessions and upon the completion of viewing of our sessions and by email request to Training@californiaknights.org, we will provide pdf copies by email of those sessions for reference material. These are available to anyone who wishes to attend and view. When a new FS is appointed, we provide an introductory welcome message and links to four recorded sessions on key aspects of the new position. I maintain

records of offerings and attendance. Here is my contact information. Email me at that address and I will send you a pdf copy of this presentation and the handouts mentioned.

CLOSING PRAYER



Prayer for the Canonization of Blessed Michael McGivney

Founder of the Knights of Columbus

God, our Father, protector of the poor and defender of the widow and orphan, you called your priest, Blessed Michael McGivney, to be an apostle of Christian family life and to lead the young to the generous service of their neighbor. Through the example of his life and virtue, may we follow your Son, Jesus Christ, more closely, fulfilling his commandment of charity and building up his Body which is the Church. Let the inspiration of your servant prompt us to greater confidence in your love so that we may continue his work of caring for the needy and the outcast. We humbly ask that you glorify Blessed Michael McGivney on earth according to the design of your holy will. Through his intercession, grant the favor I now present (*here make your request*). Through Christ our Lord. Amen.

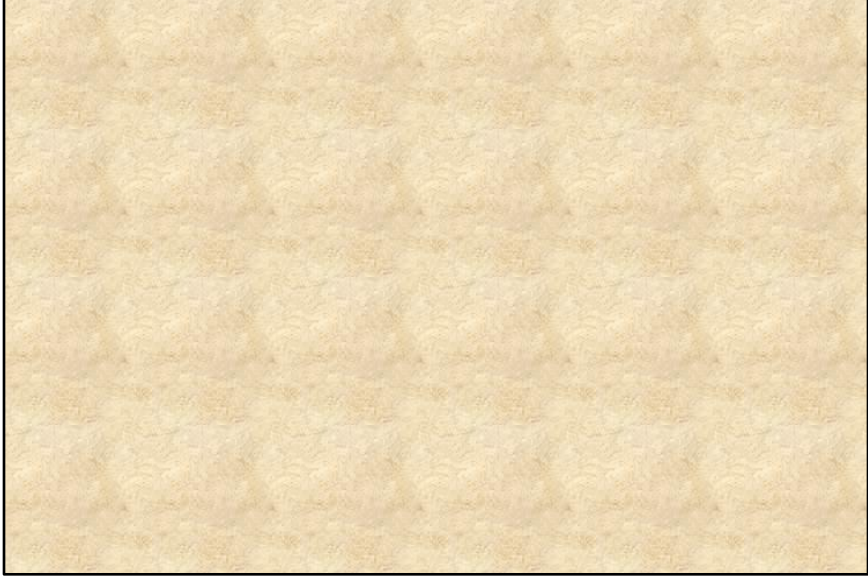
Please report all favors received:

The Father McGivney Guild
1 Columbus Plaza
New Haven, CT 06510-3326 • USA
www.fathermcgivney.org

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COMMUNICATIONS



TRAINING

