

## Proper billing procedures timeline

In my job as State Membership Retention Chairman, I regularly communicate with District Deputies and Financial Secretaries in Missouri. Sharing knowledge of processes and ideas for improvement is a valuable tool that will help create a prolific membership retention plan in our local councils.

Here is one concern that I've been asked to address:

1. Each local council's Financial Secretary needs to know where they can find the **Request for Membership Removal and Procedures Form**. There is no mention of this form in the proper billing procedures from the Supreme Council, which is the guideline our Financial Secretaries use to direct the retention committee on membership removal processes.

Answer:

This form that is intended for *state use only* is an aide for councils in Missouri to follow the Supreme guidelines for processing membership removal. The intent is to ensure that requests for membership removal are not rejected by the Supreme Council because of not following required procedures. It is not found on the Supreme Council website because it is a Missouri State form. The form is located on the Missouri State Council website under [Missouri State Council Forms \(Member Retention\)](#).

Keep in mind that the local council cannot submit to the Supreme Council any name of a non-paying member without initially forwarding a properly completed **Request for Membership Removal and Procedures Form** to the District Deputy for his review. The form must indicate that member billing attempts have been made and the local council retention committee attempted to contact the non-paying member. Once the council has received concurrence from the District Deputy and the State Retention Chairman, the local council is free to continue with the proper membership removal process as directed by the Supreme Council.

If billing statements have been returned as undeliverable, the council and the District Deputy are still required to make a good-faith attempt to contact the member. Here are timeframes for billing suggested by the Supreme Council:

### **Calendar Year Billing Example**

- 1st Notice sent to member on December 15th
- 2nd Notice sent to member on January 15th
- March 1st- Financial Secretary sends names of delinquent members to the retention committee for attempted personal contact recorded on **The Request for Membership Removal and Procedures Form**. Various methods are used to locate the non-paying member, including internet search engines.
  - As soon as possible after March 1st, the Retention Chairman will notify the Grand Knight of the results of contact after the retention committee has done their work. If directed, the Financial Secretary forwards a "Knight Alert" letter to each delinquent member, signed by the Grand Knight.
  - Notice how the **Knight Alert** letter is mailed after personal contact with the member is attempted. The order of how to reach out to delinquent members puts personal contact before a written letter. The council retention committee should first attempt personal contact with each delinquent member and the committee chairman will then compile a report to the Grand Knight on all members in arrears.
- If after 15 days of sending the "Knight Alert" the member still has not paid his dues or no satisfactory arrangement has been made, the local council will request the non-paying member be removed from the council roster.
- Concurrence of the member being removed from the council roster are contingent upon:
  - Final approval from the State Deputy
  - A viable recruitment plan for the Fraternal Year