

RETENTION WORKSHEET

COUNCIL:		MEMBERSHIP DIRECTOR'S NAME:		PHONE:	
MEMBER NAME			MEMBER WIFE'S NAME:		
PHONE NO.		MEMBER ADDRESS:			
MEMBER SINCE					
TOTAL DUES OWED AS OF JAN 1 ST		COUNCIL'S ANNUAL DUES			
NUMBER OF QUARTERS IN ARREARS		AS OF:			
DEGREE DATES	1ST DEGREE:	2ND DEGREE:	3RD DEGREE:		
CONTACT DATE:	BY WHOM:			PHONE:	
COMMENTS:					
PROCESSING DATES					
1ST NOTICE SENT:		2ND NOTICE SENT:		KNIGHT ALERT LETTER SENT:	
1845 SENT	TO MEMBER:	TO SUPREME:	1845 WITH THIS WORKSHEET	TO STATE:	TO DD:
FORM 100 SENT TO SUPREME			CONFIRMATION FROM SUPREME		

**PROPER BILLING PROCEDURES INCLUDING USE OF THE
NOTICE OF INTENT TO SUSPEND & RETENTION WORKSHEET**

1. The financial secretary will mail the Membership Bill - First Notice Form #423 **15 days prior to the billing period.**
2. If payment is not received **in 30 days**, the financial secretary will mail the Membership Bill - Second Notice Form #424.
3. If payment is still not received **at the end of the first month** in which the member has failed to pay his dues:
 - The financial secretary will fill out a **RETENTION WORKSHEET** and insure that it is provided to the Council Retention Director. The WORKSHEET will now be used to manage and track activities as the Membership team investigates the status of the member.
 - A "Knight Alert" letter Form #KA1 will be forwarded to each delinquent member, signed by the grand knight and trustees. A copy will be attached to the WORKSHEET.
 - The grand knight will work with the Membership team and insure that this **RETENTION WORKSHEET** is completed. If the member is experiencing financial or other difficulty, the committee will make arrangements to accommodate him with a payment plan , dues assistance, or other appropriate help and make a notation on this **RETENTION WORKSHEET**.
4. If, **at the end of the second month**, the member still has not paid his dues and no accommodation or assistance was accepted by the member; the **Notice of Intent to Suspend** Form #1845 is to be prepared. It is signed by the financial secretary, countersigned by the grand knight, and distributed as follows:
 - The Original Copy is sent to the delinquent member.
 - The Supreme Office Copy is forwarded to the Department of Membership Records. The Supreme Knight will mail a personal letter to the delinquent member. This letter will convey the Supreme Knight's interest in having the member retain his "good standing" status.
 - The State Council Copy is mailed to your State Deputy along with a copy of this **RETENTION WORKSHEET**. The State Deputy will write to the member and the State Membership team will contact the member. Both offering assistance and advising him that the District Deputy in his area is available to help with any particular problems.
 - The District Deputy Copy is sent to your District Deputy along with a copy of this **RETENTION WORKSHEET**. He will attempt to contact the delinquent member to discuss the arrearage situation. In the course of the conversation, suggestions as to a possible solution will be recommended, and the District Deputy will volunteer to assist the member, if a need exists. The District Deputy will also determine whether personal contact has been made by the council. The response and reaction received from the delinquent member is recorded on the reverse side of the District Deputy Copy of the Form #1845 and then forwarded to the State Membership team. The Council Copy is retained for council files.
5. If the delinquent member does not meet his obligation or arrange a satisfactory payment schedule **within 30 days following processing of the Form #1845**, the council may file a **Form 100 Membership Document, indicating suspension**. However, the suspension will not be processed at the Supreme Council office unless a Notice of Intent to Suspend Form #1845 has been on file for the required 30 days.
6. The Notice of Intent to Suspend Form #1845 becomes **null and void 60 days following the date it is recorded at the Supreme Council office**. After the 60-day period has elapsed, the 1845 form will be removed from the file under the assumption the council has been successful in retaining the member. The Form #1845 will also be **voided at Supreme by the State Deputy** if the **RETENTION WORKSHEET** is not filled out and filed properly and the efforts by the Council have not been proper as indicated by the information on the **WORKSHEET**.