



## How to Execute the Retention Process

The mission/goal of retention is to apply the principle of Fraternity to situations where our brothers find themselves out of communication with the rest of the membership.

The **Council Retention Committee** works to keep the council's members active, implements programs and practices that provide mentors for new members and regularly communicates with the members to encourage their participation. When students graduate, the committee helps them transfer to a council in their area. At times when a council wishes to suspend members, they must have the committee reach out to members and ask them to keep their membership or to transfer to another council.

### RETENTION CHAIRMAN

The Retention Chairman is appointed by the grand knight, in consultation with the membership director. He builds a small team of members to ensure a consistent outreach to members during the fraternal year and works to keep the council's members active once they join. He should consider implementing programs and practices that provide mentors for new members and he should regularly communicate with the council to encourage their participation.

- Council level retention includes re-recruitment and all actions in the matter of non-payment of dues.
- Oversees the retention committee in all of their activities to retain members.
- The Retention Chairman can be anyone from the council but most councils choose one of the following:
  - Deputy Grand Knight – This person is recognized as a key Council Leader. Acting as Retention Chairman provides him an opportunity to practice his leadership skills and understand membership issues.
  - Past Grand Knight – They are best suited and are intimately familiar with the council's membership roster and many of the members
  - Specific Proposers – The Retention Committee should solicit the assistance of any/all Proposers for the members who have not yet paid their dues. These men helped to recruit these members and may have insight and knowledge valuable to help the Retention Committee.

### RETENTION COMMITTEE

The Retention Committee assists the Retention Chairman in fulfilling the duties of the Retention Committee.

Trustees - Trustees *should* willingly serve on the council's retention committee. They are best suited here especially when they are Past Grand Knights and are intimately familiar with the council's membership roster and many of the members.

Another reason for the Trustees to serve here is that ***your council pays per capita and Catholic Advertising assessments*** to Supreme and the Michigan Knights of Columbus ***even for members who are not paying their dues***. Since the council's financial well-being is your responsibility, you have a vested interest in retaining members or seeing that the Financial Secretary follows the correct procedures for suspension of members who are delinquent in their dues payments.

NOTE: The Financial Secretary is NOT a member of the Retention Committee. The Financial Secretary provides information to the Retention Committee and processes all paperwork with Supreme. The Financial Secretary should not be asked to contact members whose dues are in arrears.

But even before any delinquency, the Retention Committee should contact a few members each month that have not attended meetings recently. Ask about their family, their health, if they need a ride to the meeting, would they be able to help at the upcoming events, do they have an e-mail address, do they know someone that would like to join the Knights.







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Here is the step-by-step retention process

### 1. 1/15 - SEND 2<sup>nd</sup> PAYMENT NOTICE (FORM #424) TO MEMBER

- a. The Financial Secretary sends payment notices to the members by December 15<sup>th</sup>.
- b. After sending the first payment notice to the general membership, the Financial Secretary sends a second payment notice to those members who have not paid their dues by January 15<sup>th</sup>.

### 2. 2/15 – RETENTION COMMITTEE PERSONAL CONTACT

- a. If payment is not received within 30 days from the date the "Second Notice" was sent, the Financial Secretary will provide names, contact information, and amounts due for each member in arrears to the retention committee for personal follow up. This can be done in any format the council wishes but there are 2 preferred methods and best practices.
  1. For councils (Financial Secretaries) that effectively use Member Management, there is a report that can be automatically run in Member Management.
    - Get into Member Management
    - Click on Print Center MM 
    - Click on Billing Reports 
    - Click on Retention 
    - Click on Retention Committee Report 
    - Save the PDF and send it to the Retention Chairman
  2. For councils that prefer, the Financial Secretary can provide the information to the Retention Chairman in any format.
- b. The Retention Chairman shall initiate the Retention Worksheet. The worksheet can be the Member Management Retention Committee Report (described above), the Michigan Form #MI-12 Link = [Retention Worksheets 20.07 \(mikofc.org\)](https://www.mikofc.org/retention-worksheets-20.07) or an excel spreadsheet. The Chairman will document on the worksheet the names, contact information, and amount due for each delinquent member and distribute the worksheets to the retention committee members.
- c. The retention committee should invite the proposer (if available) and decide on who is the best person to make the initial contact with the member. They will attempt to contact each delinquent member (3) times over a (3) week period to discuss the reasons for non-payment along with any personal situations prohibiting payment and offer a cooperative remedy to the delinquency situation.
- d. The caller needs to start by asking himself Why did I originally join the Knights, what do I personally get out of being a knight, and What have I been able to give as a knight. He can then speak from personal experience and speak sincerely brother to brother:
- e. The caller also needs to be properly prepared so he can talk intelligently with the member. He needs to know the events the council is participating in and the charities that are benefiting from the events. He should know how much was donated to each charity and what services were provided.
- f. He should be able to explain the benefits as a member ([Knights of Columbus Member Benefits \(kofc.org\)](https://www.kofc.org/knights-of-columbus-member-benefits)).



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- g. He should know how to handle special situations like non-catholicity, physically unable to work, policies regarding felony charges. All of these are found in the Retention Guide available in the state website. If he does not know the answer to a problem he should find out and get back with the member.
- h. As the conversation continues, excuses will arise and the caller needs to have answers to those excuses.
- i. They Retention Committee Members will document the results of their activities on the retention worksheet. [Retention Worksheets 20.07 \(mikofc.org\)](#)
- j. If the Retention committee finds they do not have current contact information for any member, they should try and locate the information. Here is a reference document to help. [Locate lost members Search Databases 20.10.11 \(mikofc.org\)](#)
- k. They shall determine if the member is properly credited as Life or Honorary Life.
- l. They shall determine if the member has a disability that would qualify him for relief from payment.
- m. If the member is experiencing financial difficulty, the Retention Committee can recommend to the Grand Knight that he advise the Financial Secretary to accommodate the member with a payment plan or other financial arrangement that is acceptable to the council.
- n. See the document "How to Make Retention Phone Calls" [Retention Director - Making Phone Calls \(PDF\) 20.11 \(mikofc.org\)](#) for best practices for making member contacts.
- o. See the document "Retention Considerations" [Retention Director - Retention Considerations \(PDF\) 20.11 \(mikofc.org\)](#) for best practices in various situations.

### 3. 3/15 – SEND KNIGHT ALERT (FORM #KA1) TO MEMBER

On or around March 15th, if directed, the Financial Secretary forwards a "Knight Alert" letter to the delinquent member, signed by the Grand Knight.

### 4. 4/01 – PREPARE AND SEND NOTICE OF INTENT TO RETAIN (FORM #1845) TO MEMBER

- a. If attempts to solve the problem fail, on or about April 1st, the Financial Secretary prepares a Notice of Intent to Retain (Suspend) <https://kofcfraternal.mymarketingbench.com/catalog/ListItems.epm?cid=-1&vm=carousel&searchMode=true&skw=1845#> and obtains a countersignature from the Grand Knight. These forms can be ordered from Supplies Online (in Officer's Online). Send the original to the delinquent member, the Supreme Office Copy to the Supreme Council Department of Membership Records.
- b. Upon receipt of the "Intent to Retain (Suspend)" form the Supreme Knight mails a personal letter to the delinquent member to convey the Supreme Knight's interest in having the member retain his "good standing" status.

### 5. 4/01 – FORWARD WORKSHEETS TO THE DISTRICT DEPUTY

- a. The Retention Chairman will review the completed retention worksheet with the Grand Knight. The Grand Knight will present the findings at the next officers meeting to determine if members are to be suspended or need assistance. Personal financial difficulty is not a sufficient reason for suspension.
- b. The Grand Knight shall review the Retention Worksheet with the District Deputy.
- c. The council shall keep copies of the Retention Worksheet as well as other documents for council records.
- d. If the committee is unable to make contact by phone, two committee members will visit the member at home to investigate and resolve the problem. The committee should consider that each brother deserves



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our personal attention and that some members may be embarrassed to find themselves in this situation. If the member has moved, the payment notice should have been returned with a forwarding address. However, if an address is unavailable from returned correspondence, contact other members or the parish priest to try to discover the new address. If that fails, contact the State Retention Director to request current contact information.

- e. If you discover that he is deceased, print the confirming documentation, attach it to a Form #100 Membership Document, and submit to Supreme. This will be accepted by Supreme and not be charged as a suspension.
- f. Unless the brother is no longer a practical Catholic, every attempt should be made to re-recruit this brother.
- g. The Grand Knight shall ensure that all accommodations and remedies are considered.

### 6. THE STATE RETENTION DIRECTOR MONITORS THE CONSERVATION LIST (ON-GOING)

- a. The State Retention Director, on behalf of the State Deputy will have the responsibility of monitoring the conservation listing, posted each Saturday morning on the Supreme web site in the Officers Online area. The same has the responsibility to ensure that the District Deputy and State Retention Team have access to the conservation list. He should also communicate with the member, offering assistance and advising him that the District Deputy in his area is available to help with any particular problems.
- b. Areas of concern:
  - 1. Review Age and years of service of each delinquent member to identify any patterns that might indicate changes to the council programs.
  - 2. Give special consideration to members who are or close to being Honorary or Honorary Life Members
  - 3. Provide the Insurance agent with names of delinquent members who have insurance with the order.
- c. The District Deputy will continually monitor the efforts of the retention committee. The response and reaction received from the delinquent member is recorded and then forwarded as soon as possible to the State Retention Director for review.
- d. The District Deputy will verify that:
  - 1. All members that are recommended for suspension have been contacted.
  - 2. All accommodations to resolve the problem have been investigated.
  - 3. All remedies short of suspension have been considered.
- e. The District Deputy shall include the Diocesan Membership Director in the retention process.
- f. The State Retention Director and Diocesan Membership Director will review the Retention Worksheet and make appropriate contacts.

### 7. 6/01 – SUSPEND MEMBER

- a. The Supreme Council will not process a suspension until after the Notice of Intent to Retain (suspend) has been on file 60 days. The Financial Secretary will send the Membership Document Form #100 to the Supreme Council between 60 and 90 days after Supreme receives the Intent to Retain (Form #1845). The Supreme Office will then suspend the member(s). The Notice of Intent to Retain (Suspend) becomes null and void 90 days following the date it is recorded at the Supreme Council office.
- b. Supreme will not process suspensions if a Retention Committee Chairmen has not been reported to Supreme on Service Program Personnel Report #365.



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### 8. JUNE – REPORT TO COUNCIL

- a. The Chairman of the Retention Committee shall report at a council meeting the number of members saved and the number suspended. While it is not necessary to include names in the report, it is important to give the reasons why a brother chose to leave the Order. This is to allow the council to reflect on possible changes needed to prevent a reoccurrence.

### DISABILITY – RELIEF FROM PAYMENT

Those brother knights who are unable to engage in any occupation for a period of at least six months may apply for a waiver of dues under Section 118(e) of the Charter Constitution and Laws. Furnish evidence of total disability to the Supreme Council, along with Application for Relief from Payment of Council Dues and Supreme and State Council Per Capita Charges (Form #1831). [application for relief from payment of council dues and supreme and ... \(kofc.org\)](http://kofc.org) All disability waivers expire each year on December 31 and must be renewed during the 90-day period prior to expiration. Supreme Council will send a request for confirmation of continued disability during October. Failure to complete and file the annual renewal form will terminate the council's relief from payment.

### WITHDRAWAL

According to Supreme Council, the withdrawal transaction cannot be reported by using the Membership Document Form #100. Rather, a personal signed communication from the member requesting withdrawal (resignation) is required to be sent to the council and assembly and forwarded to the Supreme Council office. Financial standing is not a consideration. A member can resign whether he is current in dues or in arrears. The only stipulation is that he must be eligible for re-entry as of the date he files his letter of withdrawal with the council and assembly. Withdrawal is not an option for a felon, non-practical Catholic, or someone who has been suspended or expelled under Section 162 of the Order's Laws. Those members who apply for and are granted a withdrawal do not maintain continuous membership. The membership record will reflect a break in membership. Upon receipt of the valid withdrawal request, the Membership Records Department will scan the request and email it to the State Retention Chairman with copies - for informational purposes - going to the State Deputy, the State Membership Director and the Membership & Program Consultant. After sending the withdrawal request via email, the Membership Records Department will place a hold on the withdrawal request for sixty days from the date received. If Membership Records receives personal documentation that the member will remain a Knight, from either the member himself or from the member via the State Council, the withdrawal request will not be processed. If Membership Records receives no notification within sixty days, the withdrawal request will be processed with no further notification to the State Council. If the applicant for withdrawal is an insurance member, he will be recorded as an inactive member and will remain in that status on the council roster as long as his insurance is in force. The council continues to be responsible for Supreme and state council assessments on inactive members. However, a \$9 credit is applied to the council's account the month following the anniversary date of the member's insurance policy to offset such assessments. The transaction is charged as a loss against Supreme Council Award quotas: