

2018/2019 MEMBERSHIP RETENTION PROGRAM

JULY 6 2018

PRESENTED BY:

BJ HARRISON

ONTARIO STATE RETENTION DIRECTOR



Knights of Columbus Member Benefits

Aside from the numerous personal rewards that come from being a Knight, here is a list of the many substantial rewards for you and your family.



**KNIGHTS
OF COLUMBUS®**

RETENTION STRATEGIES

Columbia Magazine — Free subscription to the Order's award-winning magazine examining issues of concern to Knights, Catholics and families

Knights of Columbus rosary — Blessed by the supreme chaplain, presented during the Admission Degree to each new member

Daily Mass of Remembrance at St. Mary's Church — Mass for deceased members and their wives at the birthplace of the Order

Insurance — Access to a portfolio of top-quality life insurance, long-term care insurance, disability income insurance and annuity products exclusive for members, their spouses and their dependent children

Family Fraternal Benefit — For eligible families: a) pays \$1,500 for the child who dies before the age of 61 days; b) pays \$750 for the child who is stillborn at least 20 weeks after conception; c) offers guaranteed-issue insurance — up to \$5,000 — to any child under age 18

Orphan Benefit — \$80 monthly allotment for orphans of eligible families; up to \$7,000 in college scholarships available

Member/Spouse Fraternal Benefit — Accidental death coverage for member and spouse at no cost

Widow Benefits — a) continues to be covered under the Member/Spouse Fraternal Benefit; b) may purchase life insurance, long-term care insurance or annuities up to one year after insured member's death; c) receives a free lifetime subscription to *Columbia*; d) eligible with her children for scholarships, student loans, etc.

Scholarships — Scholarship programs for higher education available to members, their spouses and children

Leadership Development — Opportunity to build personal leadership skills, public speaking ability, organizational skills, etc.

Fourth Degree — Eligibility to join the Patriotic Degree

Honorary Life Membership — At age 70 with 25 years of membership

Membership Card — Entitles participation in all Catholic, fraternal and social activities in member's council and also in over 15,000 councils throughout the world

Activities — Participation in a variety of programs and activities conducted by your council

2773

Accidental Death Benefit

The Knights of Columbus will pay a benefit upon the death of a member or his spouse, occurring within 90 days, as the result of injury sustained in a covered accident. Protection is on a 24-hour basis for accidents that may occur anywhere in the world during activities on or off the job, on business, pleasure, vacation, or at home, except for the exclusions listed.

Benefits

Years of Continuous Membership	Member Benefit	Spouse Benefit
Less than two years	\$1,000	\$1,000
Two years, but less than three	1,500	1,500
Three years, but less than four	2,000	2,000
Four years or more	2,500	2,500

INSURANCE MEMBERS – GIVE LIST TO FIELD AGENT TO CONTACT

DISABILITY INSURANCE

- MEMBERS WHO ARE DISABLED OR ILL SHOULD BE PLACED ON THIS
- DUES & PER CAPITA ARE WAIVED BY SUPREME & STATE
- SUBMIT 1831
- DOCTORS NOTE OR REPORT
- DISABILITY PAY STUB

RETENTION STRATEGIES

▶ MEMBERS TO STOP SUSPENDING

▶ MEMBERS WITHIN 5 YEARS OF HONORARY/HONORARY LIFE

▶ MEMBER 70+ YEARS OLD

▶ MEMBERS IN FINANCIAL HARDSHIP

RETENTION STRATEGIES



NEW FORMS & PROCEDURES

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Ontario State Office, Knights of Columbus
393 Rymal Road West, Suite 201
Hamilton, ON L9B 1V2
Fax (905) 388-8738
E-mail: stateoffice@ontariokofc.ca

FORM SO-47
AUTHORIZATION TO SUBMIT
FORM 1845 INTENT TO RETAIN

For the twelve month period ending December 31ST, 20 ____

Date:

MONTH/DAY/YEAR

Council #

District #

City/Town

SO 47
AUTHORIZATION TO SUBMIT
FORM 1845 INTENT TO RETAIN

SECTION I.

1) Faith In Action / Recruitment Programs:

Please indicate if your Council provides 2 or more in each category.

a) Membership growth activities

YES ☐ NO ☐

b) Faith activities

YES ☐ NO ☐

c) Life activities

YES ☐ NO ☐

d) Community activities

YES ☐ NO ☐

e) Family activities

YES ☐ NO ☐

2) Star Council achievement likely?

YES ☐ NO ☐

3) State Trillium SO-11 form submitted (past 12 months)?

YES ☐ NO ☐

SECTION II.

1) Supreme form 185 submitted (current year)?

YES ☐

NO ☐

2) Supreme form 365 submitted (current year)?

YES ☐

NO ☐

3) Supreme form 1295 submitted (past 6 months)?

YES ☐

NO ☐

4) Supreme form 1728 submitted (past 12 months)?

YES ☐

NO ☐

5) Supreme form SP-7 submitted (past 12 months)?

YES ☐

NO ☐

SECTION III.

1) Current phone tree list?

YES ☐ NO ☐

2) Routinely calls members each quarter?

YES ☐ NO ☐

3) Active Welcome Committee for all new members?

YES ☐ NO ☐

4) Participates in the Shining Armor program?

YES ☐ NO ☐

5) Mentor Program in place?

YES ☐ NO ☐

SECTION IV.

1) Conducted a recruitment campaign in past 3 months?

YES ☐ NO ☐

2) Recruited new members in the past 12 months?

YES ☐ NO ☐

3) Membership chairman and committee?

YES ☐ NO ☐

4) Invited FA or GA to participate with membership?

YES ☐ NO ☐

5) Provided a fraternal benefits night in past 6 months?

YES ☐ NO ☐

6) Monthly bulletins to all members?

YES ☐ NO ☐

SECTION V.

1) DD received conservation list?

YES ☐

NO ☐

2) DD has made attempts to call all members on list?

YES ☐

NO ☐

3) DD has provided proof?

YES ☐

NO ☐

District Deputy

Grand Knight

Internal purposes:

Date received: _____ M/D/Y

State Retention Director

State Deputy

FS NO LONGER SIGNS
DD SIGNS ONLY IF HE AGREES



Ontario State Office, Knights of Columbus
393 Rymal Road West, Suite 201
Hamilton, ON L9B 1V2
Fax (905) 388-8738
E-mail: stateoffice@ontariokofc.ca

Request for Membership Suspension - Form SO-48

Suspension ☐

Withdrawal ☐

Member Info:

Last Name	<input type="text"/>	First Name	<input type="text"/>	Middle Name	<input type="text"/>
Age	<input type="text"/>	Years of Service	<input type="text"/>	Membership #	<input type="text"/>
1st Degree Date			<input type="text"/>		
Phone #	<input type="text"/>	E-mail	<input type="text"/>	Parish Name	<input type="text"/>
Mailing Address	<input type="text"/>			Member of Parish	Yes <input type="checkbox"/> No <input type="checkbox"/>

Billing:

Re-Entry Date If Applicable

Notice	Date	Dues Paid		Letter Returned		New Address	Yes <input type="checkbox"/> No <input type="checkbox"/>
First Billing	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Enter New Address	
Second Billing	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
Knight Alert (KA1)	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		

NEW SO 48

Retention

Retention Committee Member Assigned:

Attempts to Contact member - Voicemail and Billing are NOT considered contact. In comments, indicate how contact was made, i.e. home visit, email, parish etc.

Contact #1 Date:

Contact #2 Date:

Contact #3 Date:

comments

comments

comments

Signatures below certified complete retention activity by Grand Knight, Deputy Grand Knight, and Trustees (all required):

Grand Knight

Deputy Grand Knight

Trustee 1 yr

Trustee 2 yr

Trustee 3 yr

Send Results (this form, SO-47 and supporting documentation to District Deputy. DD will complete his requirements and forward results/recommendations to the State Retention Director

State

State Retention Director will contact District Deputy with Recommendations.

District Deputy

State Retention Director

comments

comments

Recomendation

Recomendation

Concur (Submit 1845 - Intent to Suspend)

☐

Do Not Concur (Contact State Retention Director)

☐

PRINT

RESET FORM

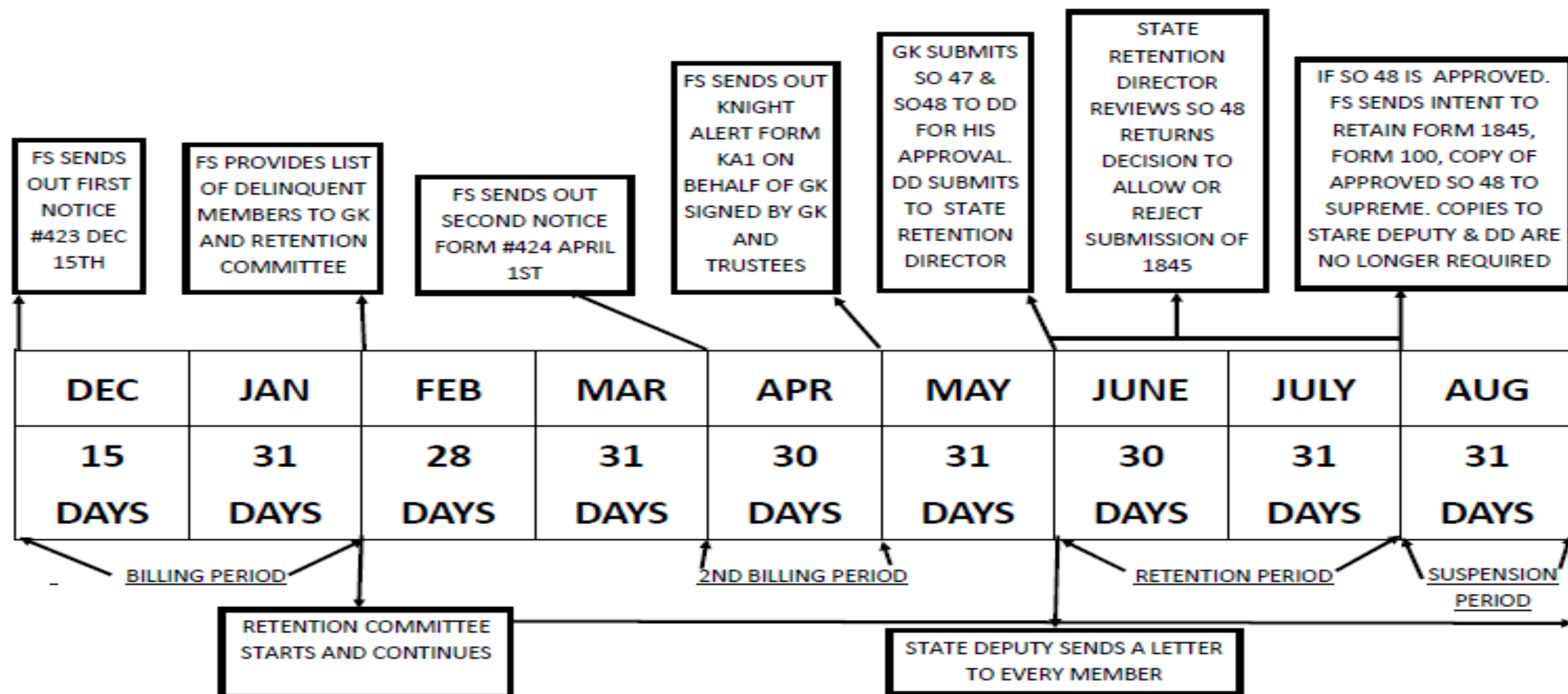
Note: Instructions and Procedure on attached page. Please read as procedure has changed

- ▶ FORM SO 48
 - ▶ REQUEST FOR MEMBERSHIP
SUSPENSION / WITHDRAWAL
 - ▶ INSTRUCTIONS AND PROCEDURES
- 
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- 1) Completely Fill Out the following Sections (**Minimum Three-Month Effort**)
 - a. Member Info - All information can be obtained from the Grand Knight or the Financial Secretary via Member Management.
 - b. Billing -
 - I. Note the date of each billing notice and Knight Alert (KA1) is sent
 - II. Indicate whether dues were paid for each billing
 - III. Indicate whether billing was returned
 - IV. If applicable indicate what the new address was indicated with return or during Retention efforts. If returned make all efforts to find no address, social media, web search etc.
 - c. Retention -
 - I. Each delinquent member should be assigned to a member of the Retention committee.
 - II. Multiple contacts must be attempted. Note that leaving a voicemail three times does not count as three contact attempts.
 - III. Comments about the contact attempt should be noted.
 - IV. Grand Knight as exoffico member of the Retention committee and leader of the local council must sign off that all retention efforts have been exhausted and be prepared to assist the District Deputy and State Retention Director as needed.
 - V. Deputy Grand Knight and Trustees as official members of the Retention Committee must sign off that all Retention efforts were exhausted by the assigned member.
 - d. State -
 - I. Once Retention efforts are complete, the form should be submitted to the District Deputy.
 - II. District Deputy will conduct further Retention efforts on behalf of the council and make a recommendation to the State Retention Director.
 - III. State Retention Director upon receiving the Request for Membership Suspension will conduct further retention efforts on behalf of the State Deputy.
 - IV. State Retention Director after discussing his results and conclusions with the State Deputy will then make a recommendation on concurrence of suspension.

- 2) Once the council has received concurrence from the District Deputy and State Retention Director, the local council is free to process the suspension as it sees appropriate
(60-day Retention period)
- 3) Concurrence of suspension is contingent upon:
 - a. Final Approval from the State Deputy
 - b. A viable recruitment plan for the Fraternal Year
 - c. Cooperation from the District Deputy and local council with the State Retention Director
 - d. SO-47 and SO-48 submitted to State Retention Director
- 4) When 60-day retention period is complete, and the local council has received authorization to suspend from the State Retention Director, the local council can now submit the following forms to Supreme – 1845, 100, SO 48. Once received the suspensions will take place (there will be no retention period by Supreme) Please allow time for processing. Forms must be submitted to Supreme within 30-days of Approval if not the local council is prohibited from processing an Intend to Retain until the next billing cycle and process must be started over.

ONTARIO STATE BILLING PROCEDURE AND RETENTION TIMELINE



ONTARIO STATE KNIGHTS OF COLUMBUS RETENTION BILLING PROCEDURES

A vital and important part of the welfare of any Council is the collection of dues and per capita assessments from members. The Grand Knight and the Trustees should, therefore, always be certain that the following *Retention process* is followed.

Financial Secretary: Please note that the financial Secretary should use the Member Management and Member Billing application, located in the secure Officers Online area of www.kofc.org (refer to pg2 attached)

1. The Financial Secretary mails the membership bill **"First Notice"** 15 days before the billing period Jan 1 to each member.
2. If payment is not received within 30 days of billing period (Jan1 – Jan 31), the Financial Secretary will provide a list of delinquent members to the Grand Knight and Retention Committee. (Refer to Pg2 to see the appropriate Committeemembersand their roles.)
3. After 60 days of the Retention Committee attempting to retain the delinquent members, the Financial Secretary will send out the **"Second Notice"**. Retention Committee continues. (See pg.2 for full explanation on roles)
4. 30 days after mailing the **"Second Notice"** the members that have still not paid their dues, and no satisfactory arrangement has been made, the KA1 Knight alert will be mailed out by the Financial Secretary on behalf of the Grand Knight.

5. 30 days after mailing of the KA1, the Grand Knight will submit form SO 47 and Form SO 48 to the District Deputy for his review, approval or denial. The District Deputy will then forward the SO 47 and SO 48 to the Ontario State Retention Director.

6. Upon receiving the SO 48, the State Retention Director will review the form and supporting documents and return the results of his findings to the District Deputy whether approved or denied submitting of form 1845. 60-day Retention Period. The State Deputy will mail a letter to each member from the SO 48's assisting the Councils in their retention efforts.

7. a) If SO 48 is approved the Council is free to submit form 1845 Intent to Retain, Form 100, and approved SO 48 to Supreme. There will no longer be a 60-day Retention period from the date received by Supreme. (Original copy goes to delinquent member; Supreme office copy is mailed to Membership records, Council copy is retained by the Council). (Allow Approx. 30 days for processing).

b) If SO 48 is denied, the Council must wait until the next billing cycle Dec 15th and entire billing/retention process must be reimplemented as described. Reasons for denial will be provided so they can be corrected.

8.a) Supreme will then issue a Conservation List to State were the District Deputy will receive a copy from the Retention Director. Conservation list will be checked by the State Retention Director and District Deputy to ensure a SO 48 has been submitted for each member.

Councils Membership Growth will directly affect suspensions.

Note: For every New Member Recruited, council will be allowed to suspend a member.

This process is to ensure councils longevity and growth.

Financial Secretary: Instructions, recorded webinars, and help are available within the online application.

The Retention Committee should include but not limited to the Retention Chairman (indicated on form 365) the deputy Grand Knight, the Trustees, and the proposer if available.

Note: The Financial Secretary is not part of the Retention Committee.

The Retention Chairman will assign a committee member to discuss the reason for non-payment, any personal situations prohibiting payment, or offer a cooperative remedy to the delinquency situation

The Retention Chairman will notify the Grand Knight of the results.

Note: The retention committee must use various methods of contact home visit, internet search to locate, social media, parish. Voice mail does not constitute contact.

The Committee Members will report to the Retention chairman and the Retention Chairman will write up to date reports to the Grand Knight.

If a Member is experiencing financial difficulties, the retention chairman will inform the Grand Knight and Financial Secretary of the council to make accommodations for the members difficulty.

Note: Personal Financial difficulty is not a sufficient reason for suspension and if they experiencing financial difficulties they CAN NOT be suspended.

The Retention Committee is expected to attempt to retain members throughout the entire process.

The District Deputy is Expected to assist the Council throughout the process and attempt to retain members.

Insurance Field Agents should be included in retention process to assist in retaining insurance members.

Members who suffer from a disability or illness should be placed on disability were council dues and per capita is waived by Supreme and State.

The following are documents excepted by Supreme:

- a) Form 1831.
- b) Doctors note or report detailing disability/illness and stating the member inability work.
- c) Disability pension pay stub showing they receive funds from disability.

Councils should make all efforts possible NOT to suspend our elderly members 70+ years of age.

Councils should make all efforts possible NOT to suspend members who are within 5 years of Honorary/Honorary Life.

Every Financial Secretary has received clear and concise instructions on this procedure. It is the **duty of the District Deputy** to make certain that they are being carried out by the Financial Secretary and Retention committee of each of the councils in his district.

▶ RECRUITMENT

▶ DIRECTLY

▶ AFFECTS

▶ SUSPENSIONS

A series of three parallel white lines that start from the right edge of the slide and extend diagonally upwards and to the left, ending near the word 'SUSPENSIONS'.

▶ COUNCILS MUST RECRUIT IN
ORDER TO SUSPEND

▶ EACH MEMBER RECRUITED A
SUSPENSION WILL BE ALLOWED

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▶ WHAT IS CONTACT

- ▶ EMAIL

- ▶ HOME VISIT

- ▶ AT THE PARISH

- ▶ TEXT MESSAGE

- ▶ INSTANT MESSAGING

- ▶ VOICE MAIL/BILLING IS NOT CONTACT

▶WRONG / NO

▶ADDRESS OR PHONE#

▶SEARCH THE WEB

▶CANADA 411

▶FACE BOOK/SOCIAL MEDIA

▶KNOCK ON HIS DOOR & NEIGHBOURS DOOR

▶ASK FATHER

- ▶ SUPPORTING DOCUMENTATION SHOULD BE FORWARDED TO STATE RETENTION DIRECTOR

- ▶ IF NOT

- ▶ STATE RETENTION DIRECTOR MAY REQUIRE AND MAY DELAY RESPONSE