

Intended audience

Grand Knight
Financial Secretary
Membership Chairman
Retention Chairman

Playbook goal

While our goal is not to lose any member from the Order we have to realize that for some the Knights of Columbus is not for them. We have to give brothers credit for joining the Order and giving it a try. That being said, how do we manage our council roster to avoid big swings in membership? This playbook is intended to provide you some suggestions to apply within your council and to develop over time to minimize the loss of members.

Steps for success

The key to retention is activation. Once we have initiated a new member what steps are being done to get them involved and to realize the benefits from their membership? Below are some steps you as a council can take:

- Involve the sponsor of the member. Have them maintain communications with them. Invite them to the meetings and events.
- Have the Grand Knight write a letter of welcoming to the new member. Include his contact information and encourage them to get involved. Invite the member to contact the GK should the new member have

- any questions about their membership.
- When new brothers or brothers we haven't seen for awhile come to a council event/meeting, officers and membership should make a special effort to say hello, welcome them, and introduce them to others.
- The membership chairman should communicate and make personal invitations to 1st degree members to take their major degrees as they are scheduled in your area.
- Review your roster, at a minimum, quarterly. Which of the members have you not seen at church or around the council activities?
 - Through the leadership of the membership chairman make assignments to officers to contact these members and see how they are doing. Find out what is going on in their lives and invite them to an upcoming meeting or council event.
 - Contact the sponsor and ask him to reach out and engage with the brother.

Remember, it took an invitation, sometimes repeatedly, to get a prospect to join the Knights of Columbus. Continue to invite them to participate in the council after they have been initiated.

Suspending a brother

Despite all our efforts a brother may need to be dropped from the Order, either by their own initiative or from lack of payment

of dues. There is a process to do this and it should be followed to avoid complications.

Brother initiated withdrawal

If a brother wishes to withdraw from the Order he is required to make this request, in writing, to the Financial Secretary. This can be done via a written letter or via email. The member needs to clearly express his desire to withdraw. The Financial Secretary can complete a withdrawal form, via form 100, to submit a withdrawal through Supreme. The form 100 and withdrawal letter should be sent together into Supreme for processing.

Suspension for lack of dues payment

In order to suspend a member for lack of dues the Supreme procedure must be followed. This procedure is in the Financial Secretary's handbook and should be referenced and followed to suspend a member for non-payment of dues. Here are some guidelines in addition to what is found in the Financial Secretary's handbook:

- You must have a retention chairman identified and submitted to Supreme either online at the Supreme website or through submission of form 365. Without a retention chairman registered all suspension requests will be rejected.
- If you are following the steps for success you should know what is

going on in the lives of members. In this time of economic challenge we have many brothers that have lost jobs. As a guideline it is not recommended to suspend a member for dues 1 year in arrears. There may be personal situations that are causing this and the benefit of the doubt should be given to the member. Continue to reach out and seek to help. Remember, our first principle of the Order is Charity. This extends to our members as much of the church and community we support as a council.

- Include your Grand Knight, District Deputy and your Insurance Field Agent to contact the brother and to seek to understand the reason for the delay in dues payment.

Summary

Managing retention within your council is an important responsibility and requires work. Neglecting this important duty will result in an accumulation of brothers who have not paid their dues over time and a list of brothers you quickly lose touch with. Spending a little time throughout the fraternal year to make an effort to communicate to and activate the members will reap the benefits of a healthy council. It is not healthy for the council or for the Order to drop 15-25+ members at a time because we haven't been managing retention matters effectively. Effective retention and

activation policies minimize this risk and makes for a more fruitful and enjoyable membership experience within the council. These policies naturally feed into membership growth as others see that members are encouraged to be a part of the brotherhood and are a welcomed addition to the council.

Contact information

For questions and assistance please don't hesitate to contact the Colorado State Council Retention Chairman.

Jesse Taitano – Retention Chairman

7023 W. Hinsdale Drive

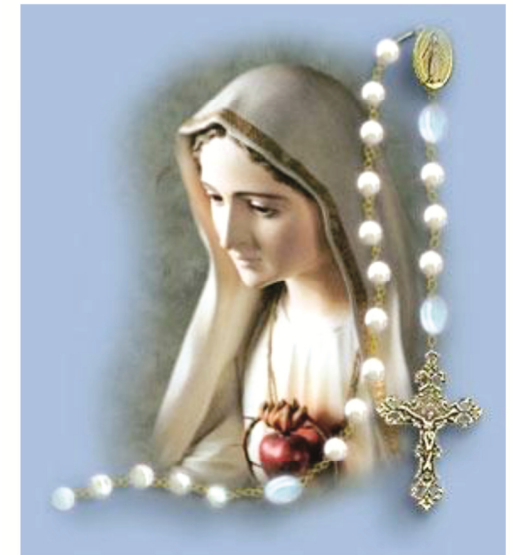
Littleton, CO 80128

email: iluvtheavs@msn.com

Phone: 303-972-6554

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To Believe is to Become



United as One!