



**Welcome to the  
2021/2022 Leadership Team Orientation  
Breakout Room**

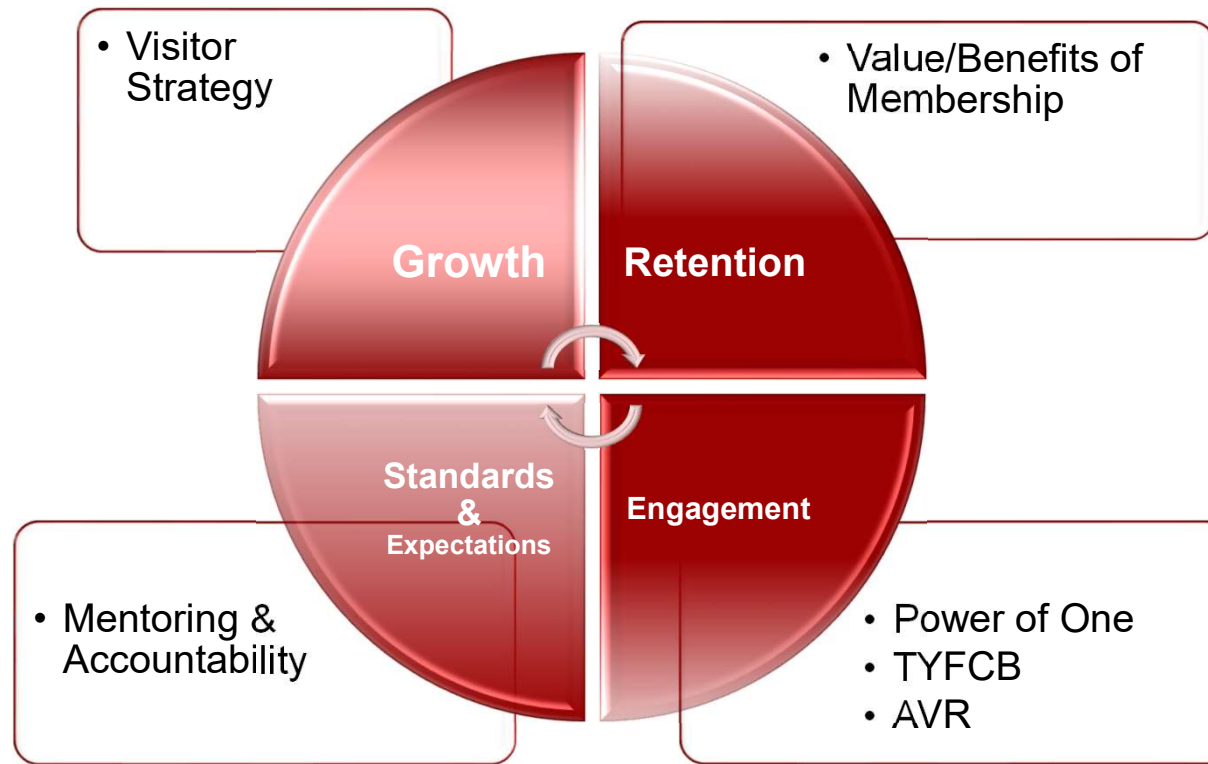
**Vice President & Membership Committee**

**Facilitated by:**

Hazel Walker, Executive Director  
Cary Rendek, Chapter Consultant



# Chapter Mission, Goals & Strategic Direction



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# Membership Committee – role descriptions

- Community Builder – growth & goals
  - Member Relations – conflict
  - Member Engagement – participation
  - Quality Assurance – applicant & renewal interviews
  - Vice President
  - Chapter Consultant
- Reference: Chapter Operations Manual
- Collaborative Focus
    - Chapter Standards – define, communicate, execute, actions to recognize & hold accountable
    - Goals – guide chapter to achieve chapter goals through strategic initiatives
    - Accountability – ensure all LT roles are being carried out



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# BNICConnect: Reports (Outputs)

## ➤ Reports | Chapter:

- Chapter Roster Report
- Membership Dues Report – renewals
- Summary PALMS Report – participation
- Personal PALMS Report – member, 7-month
- VP Report
- Chapter Visitor Report – CB Chair, Visitor Host
- Visitor Registration Report – VHC
- Visitor Not Attended Report – CB Chair, VHC



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# BNIConnect: Operations (Inputs)

- Click Operations | Chapter:
  - Manage Visitors – Visitor Host Coordinator
  - Meeting Management
    - Enter PALMS
  - Manage Memberships
    - View Pending Applications
      - New Member Applications
      - Renewing Members
  - Manage Goals
  - Create Email
  - Manage News



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# Reporting2You.com: Reports

- **Chapter Reports:**
  - Chapter Level Traffic Lights (“MRGTL” report)
  - Chapter KPI Report (“MCKPI” report)
  - Chapter Performance Report (“MCP” report)
- **Member Reports (shows Member level):**
  - Member Evolution Report
  - Member Monthly Report
  - Weekly Alert Report



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# Key Membership Committee Activities

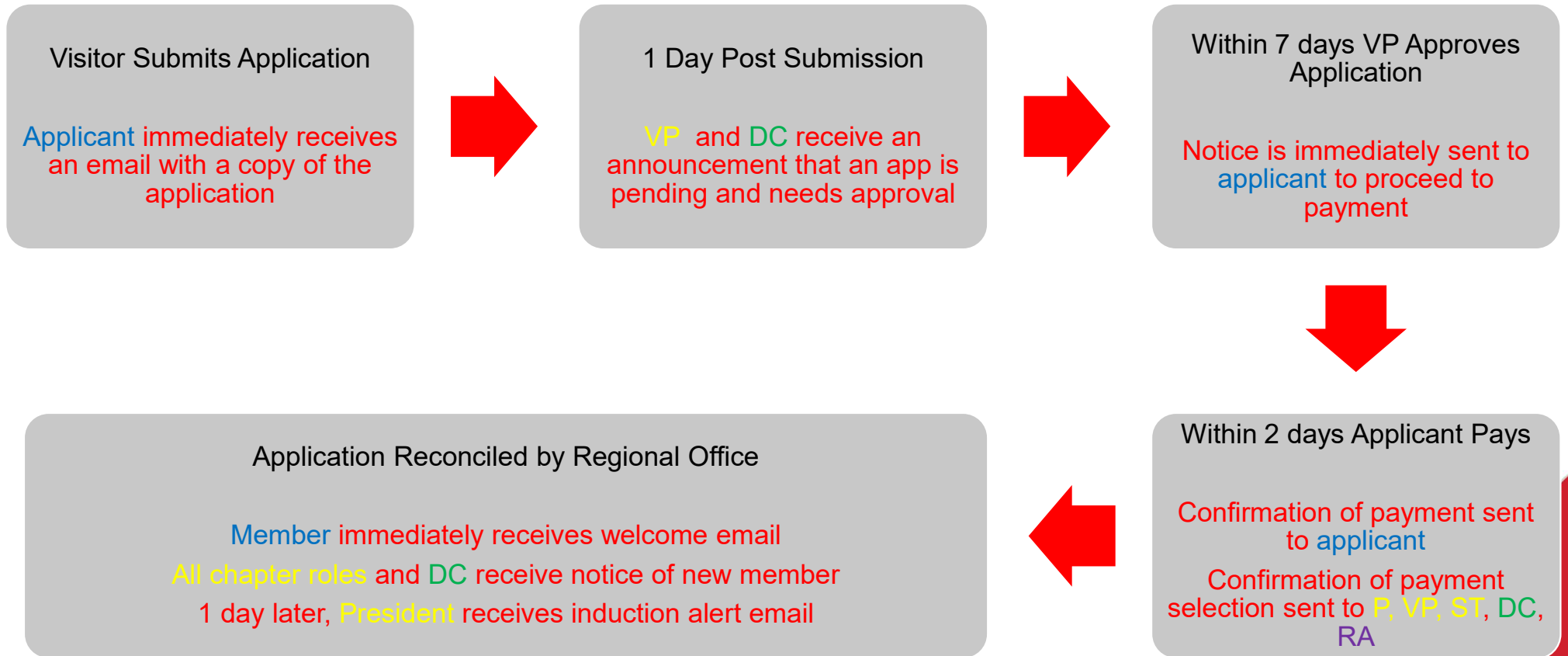


# New Member Applications

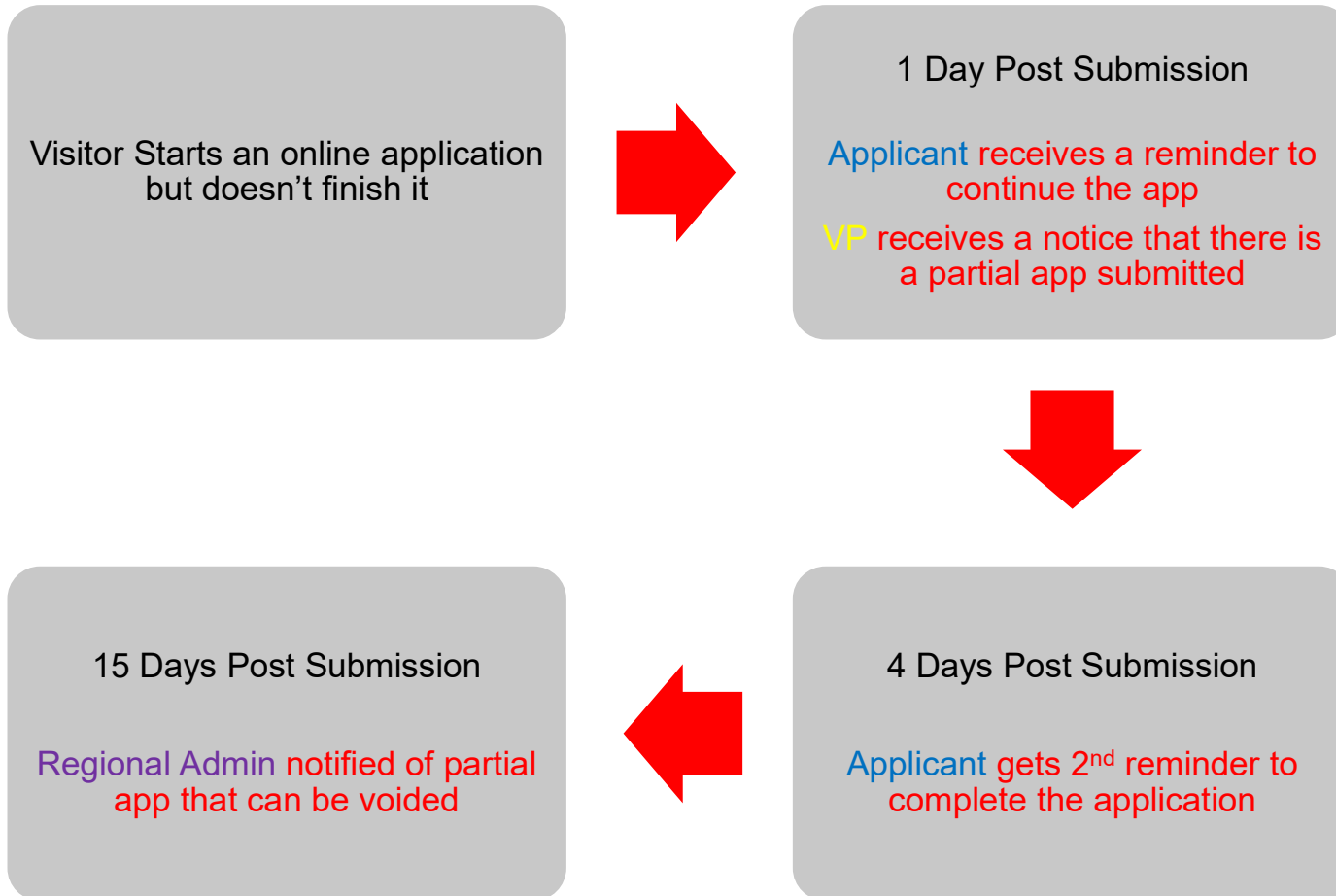
- [www.bnibc.ca/<....yourchaptername...>/ApplyNow](http://www.bnibc.ca/<....yourchaptername...>/ApplyNow)
- QR Code



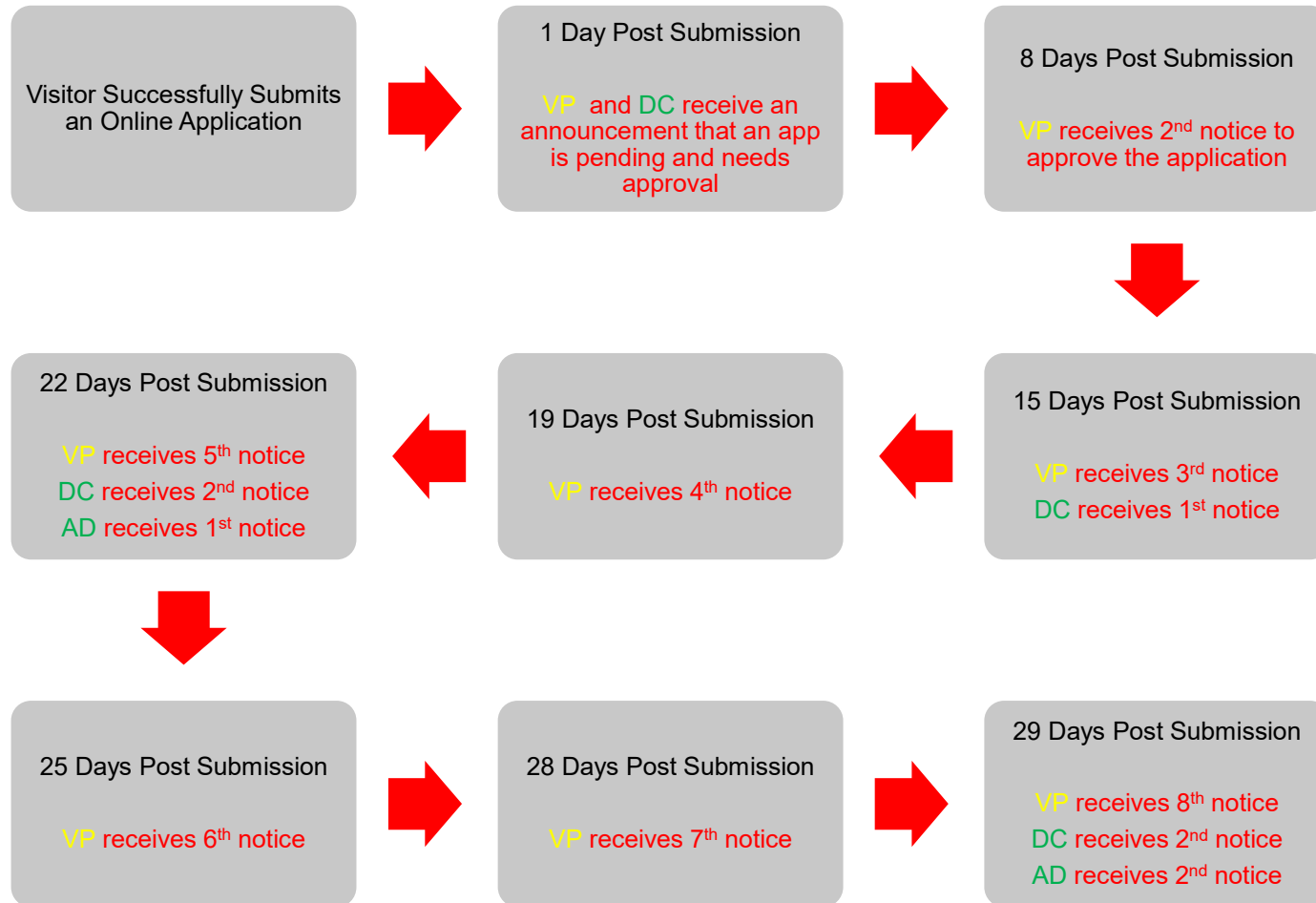
# The Perfect Online New Member Application



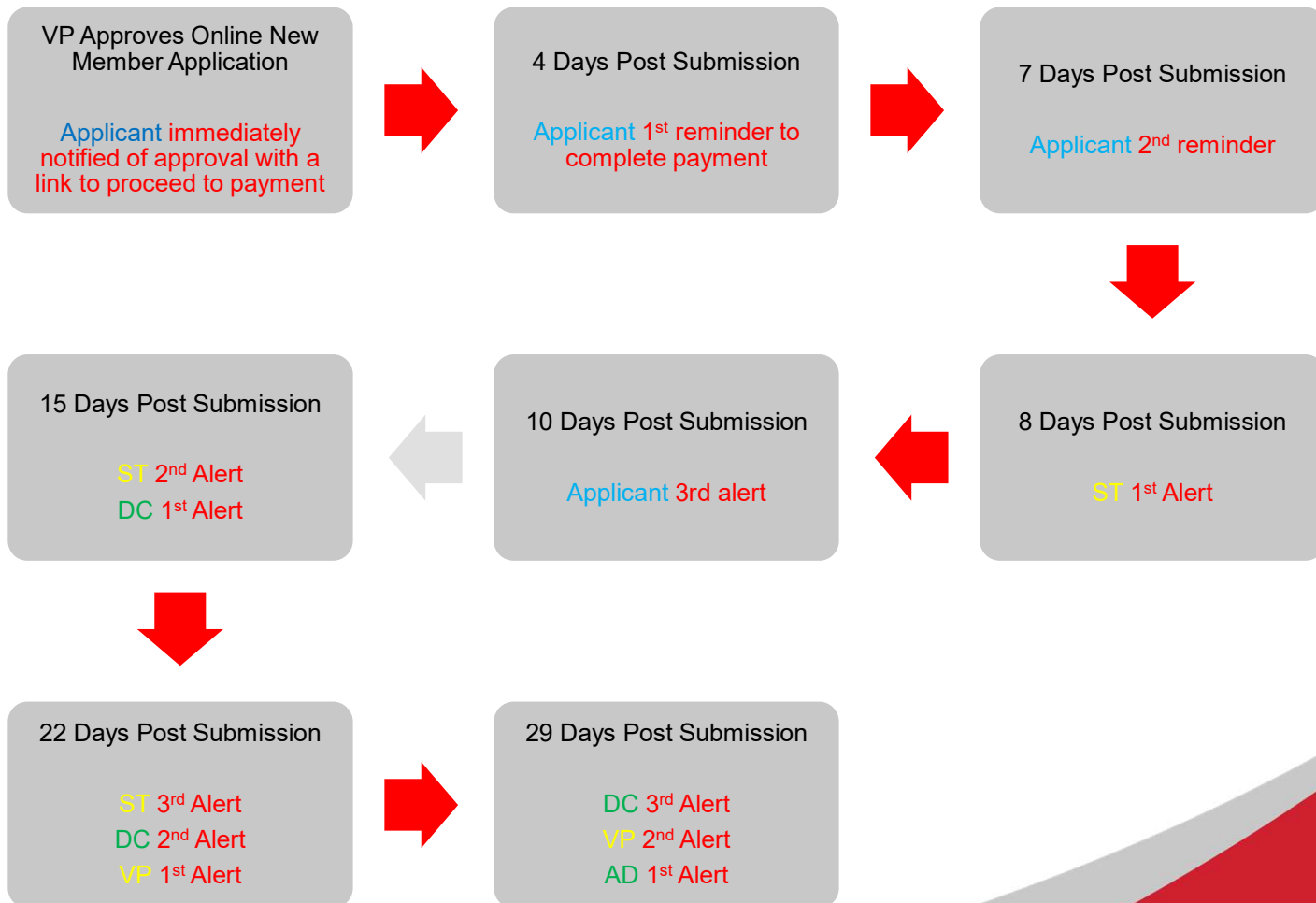
# Oh no! Application Incomplete!



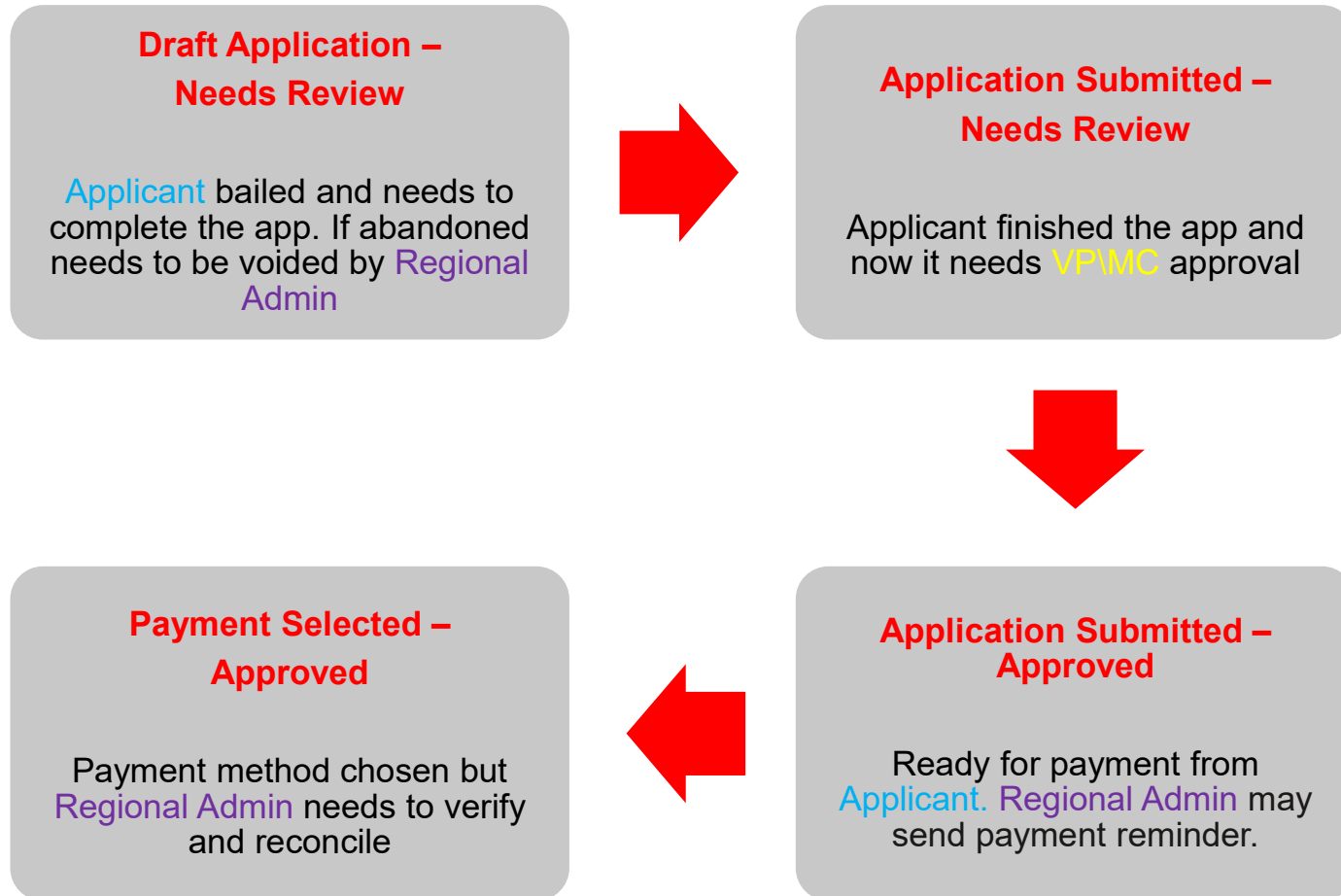
# Application Complete, but Needs Approval



# Application Approved, but Needs Payment



# Application Status



# Online New Member Applications Video Guide

12-minute video

<https://support.bniconnect.com/hc/en-us/articles/360052751932-Online-New-Member-Applications-Video-Guide>



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# The Applicant Interview Process

- Supporting Documents found in [BNIBusinessBuilder.com](https://BNIBusinessBuilder.com) ([BNIUniversity.com](https://BNIUniversity.com))
  - [Click Resources | Membership Committee \(& Vice President\)](#)
- Interview form
- Applicant letter of expectation
- References Verification
  - Licenses & Insurance
  - Personal References
  - Digital Footprint research
- Best Practices
  - Interviews must be conducted with 2 MC Chairs at same time; 2<sup>nd</sup> interview optional
  - Completion within 7-10 days
  - Competition seats: 14-21 days, depending on number of applicants



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Paper Applications are not accepted,  
without exception.



Seven Month Check-In  
vs  
Nine Month Renewal Interview



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Name of the Member: \_\_\_\_\_

**Required documents:**

- Member Traffic Lights / Power of One
- Member Training Records

**Comments by the Membership Committee**

**Development Potential**

**Strengths**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of Session: \_\_\_\_\_

Membership Committee Member: \_\_\_\_\_

**Questions During the Check-in**

1. How are you feeling in the Chapter?
2. How would you evaluate your benefits from your BNI membership?
3. To what extent have you reached your goals concerning GIVING and RECEIVING in the last six months?
4. Discussion of the comments of the Membership Committee (see above)! Possible suggestion of a mentor.
5. Which suggestions do you have?
6. Which other topics would you like to discuss?

Final question: If you had to decide today whether you will apply for your membership to be renewed, what is the likelihood (in %) that you will renew?



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## Participation Review

This Participation Review is for a 90-Day Renewal Review and can also be used on an as-needed basis by the Membership Committee.

Member Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Interviewing Membership Committee Member: \_\_\_\_\_**

**1. Review Attendance**

	Present	Absent	Late	Medical	Substitute
Member Last 6 month Average					
Chapter Last 6 month Average					
Benchmarks	≥21	≤3	0		≤3

**2. Referrals**

	RGI	RGO	BRI	RRO
Member Last 6 month Average				
Chapter Last 6 month Average				
Benchmarks	26.4		26.4	

**3. Visitors, One-to-Ones, Thank You for Closed Business and Chapter Education Units**

	Visitors	121s	TYFCB	CEUs
Member Last 6 month Average				
Chapter Last 6 month Average				
Benchmarks	6	24	\$20,000	24

4. Have you completed the Member Success Program training in the last 9 months?  YES  NO
5. Did you attend the entire Mentor Program as a mentee within the last year?  YES  NO
  - a. Are you a Mentor? YES NO
  - b. Do you want to be a Mentor? YES NO
6. Have you taken advantage of Chapter Education opportunities (such as Podcasts, Chapter Library, Power Team meetings etc)? If yes, which ones?
7. Are you getting the Return on Investment that you were expecting? If not, how can the chapter help?
8. In what areas do you feel you could use improvement? How would you go about creating that improvement? Are you willing to put that/those ideas into action today?
9. What would you improve about our chapter? How do you recommend implementing these suggestions?
10. Are you willing to take on a leadership role? What three leadership roles do you think you would enjoy most?
11. As you learn and grow in this chapter and as a business professional, in what areas would you like additional training?
12. What are your business and BNI goals for the upcoming year?

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Vancouver BC  
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# Member Renewals

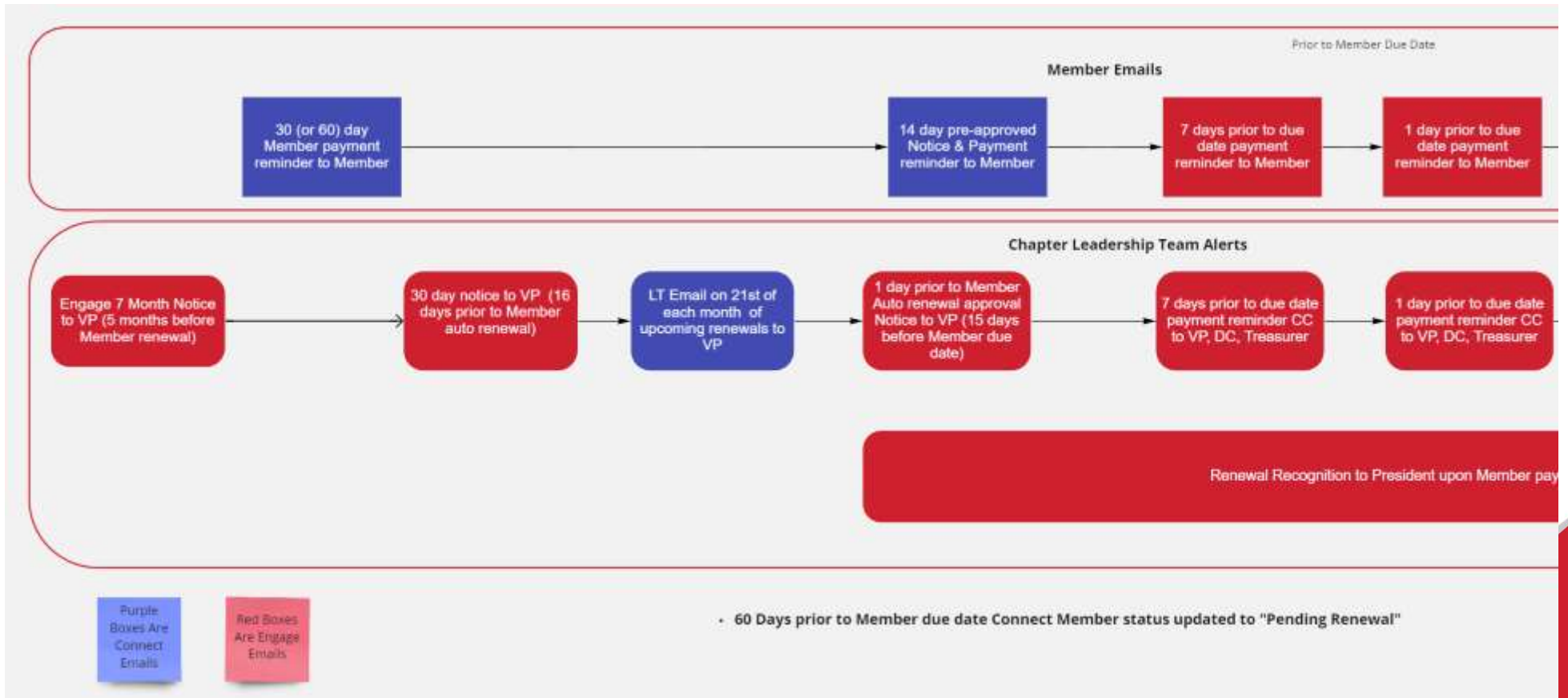
- You will need:
  - BNIConnect
    - Reports: Membership Dues Report
    - Reports: PALMS (Summary and/or Personal)
    - Operations: Pending Applications
  - Reporting2You
    - Evolution Report
    - Month Report
    - Member 6m details (click on their name in the Month Report)
  - Seven Month Check-In notes
  - Renewal interview if appropriate



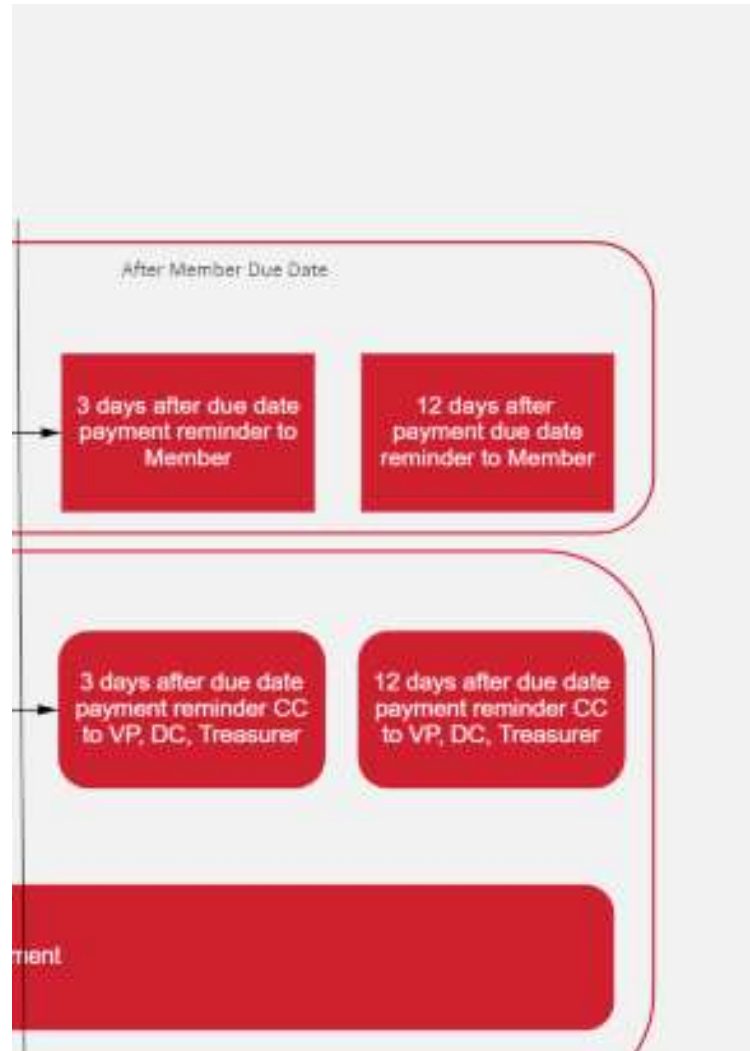
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# The Perfect Member Renewal



# The Not-so Perfect Member Renewal



Video link:

<https://www.schoox.com/academies/library2.php?acadId=8723&id=3619652>

# The Renewal Process

## Timeline Prior to Membership Expiry

- **5 months:** 7-month check-in
- **4 months:** renewal planning
- **3 months:** renewal interview – if required
- **2 months:** renewal in BNIConnect by VP
- **30 days:** when pre-approved by VP, member submits application to renew with payment
- **15 days:** last chance before auto-approval for VP to take action other than approval
- **14 days:** when member is auto-approved; member submits application to renew with payment
- **Renewal complete:** member is re-inducted into the chapter



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# When is a Renewal Late?

- *BNI Administrative Policy #3: Membership fees are payable 30 days prior to the due (expiry) date. Members not paid by the due (expiry) date are considered late and will be assessed a late charge. If fees are not paid within 30/45 days, the member will officially be dropped by BNI.*
- 0+1 day: status changes to Late; late fee assessed upon renewal payment
- 0+15 days: status changes to Expired; lose access to BNIConnect & App
- 0+30/45 days: member is removed from the chapter



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# Example: July 1<sup>st</sup> Expiry



- **February:** 7-month check-in assigned and completed
  - **March:** MC QA Chair assigns renewal interview (if required)
  - **April:** renewal interview is completed (if required), MC deliberation commences
  - **By May 1:** MC has deliberated; VP has Pre-Approved in BNIConnect
  - **By June 1:** member submits application to renew with payment
  - **June 15:** Member is automatically Pre-Approved, if not already
  - **July 1<sup>st</sup> week:** member is re-inducted into the chapter; celebration ensues
- Late renewal:**
- **July 2:** Member status is Late; late fee added to renewal
  - **July 15:** Member status is Expired; lose access & visibility in BNIConnect
  - **August 1/15:** Member status is Dropped



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## ➤ Reports | Chapter | Membership Dues Report

Membership Status	Member Renewal	Due Date:
Active		2022-06-01
Active		2022-04-01
Active		2021-10-01
Active		2021-10-01
Active		2021-11-01
Active		2021-11-01
Active		2021-12-01
Active		2022-01-01
Active		2022-01-01
Active		2022-03-01
Active		2022-07-01
Active		2022-07-01
Pending Renewal		2022-09-01

Late Members Since 2021-08-01			
	Due Date:	Member Renewal	Membership Status
	2021-09-01		Late
	2021-09-01		Late

Expired or Dropped Members Since 2021-08-01		
	Due Date:	Membership Status
	2021-08-01	Expired



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# Member Re-Induction

- Membership re-inductions are conducted on the first week of the month, for those members whose membership renews that month (and the entire renewal process has been completed)
- As part of the recommitment, you may choose to have the renewing members recite the BNI Code of Ethics
- **This is a Celebration!** Member renewals aren't guaranteed, so when it happens, acknowledge that a member has found value in being part of BNI, and specifically your chapter.



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What are all those emails?



# Renewal Reminder to LT

**BNi connect.**

## ##name## Chapter Renewal Notification

*This alert was sent to the Vice President, Secretary Treasurer, Membership Committee, and Director Team.*

Below are the members in your chapter who are due for renewal within the next 90 days. Remember, to continue to maintain and build a strong chapter it is important to review renewing members early and stay current with your chapter roster.

- Members that appear on this list that are no longer on the roster or attending meetings, it means their membership has **EXPIRED** but has not been officially closed out. Please drop the membership or contact your regional team to have this done.
- Members due on the 1st of next month should already be processing their applications. If not submitted by the 1st of the month, they will become late and will automatically be assessed for a late fee on their renewal application.
- Members due in the next two months should begin or continue the review process with the membership committee. This is a great opportunity to coach members and find ways to help them be more successful.

## Member Details

##memberstring##

# Renewal Reminder to Member

**BNI connect.**

## Your BNI Membership is Due for Renewal Soon!

*##fname##, your membership in ##chapter## is due for renewal on ##renewaldate##.*

Please begin the online renewal application process [HERE](#).

**Renew Now**

If your chapter is not utilizing the online renewal process, please contact your chapter leadership team for a paper or PDF version of the renewal application.

*Kindly note that if the application and payment are not received by ##renewaldate## an automatic late fee will be applied.*

If you would like to notify your regional team of your decision not to renew, you may do so [HERE](#). Even if you choose not to renew, you may still continue to attend meetings until the end of your membership term.

For more information contact your local BNI office or you can always reach out to BNI Connect support by submitting a request [HERE](#). We will be happy to help or get you in touch with the right people to assist.

Happy Connecting!

The BNI Connect Team

This email was sent as a system generated email, direct replies are not monitored.

# Notice of Pre-Approval to Member

**BNI connect.**

## Your Renewal Has Been Pre-Approved!

Congratulations **##fname##**! Your membership in **##chapter##** is pre-approved for renewal. We would love for you to continue with the chapter to build relationships and success in the year ahead.

Please begin the online renewal application process [HERE](#).

[Renew Now](#)

*Kindly note that if the application and payment are not received by **##renewaldate##** an automatic late fee will be applied.*

If you would like to notify your regional team of your decision not to renew at this time, you may do so [HERE](#). Even if you choose not to renew, you may still continue to attend meetings until the end of your membership term.

For more information contact your local BNI office or you can always reach out to BNI Connect support by submitting a request [HERE](#). We will be happy to help or get you in touch with the right people to assist.

Happy Connecting!

The BNI Connect Team

This email was sent as a system generated email, direct replies are not monitored.

# Renewal with Profile Changes

## **BNI connect.**

### Renewal Received with Changes

This notice has been sent to the Vice President, Secretary Treasurer, Membership Committee, Director Consultant and Regional Admin Team to inform you that a renewal has been received with changes to the membership or company information.

The requested changes have NOT BEEN APPLIED. The following action steps are needed:

- Review the changes below
- Approve the renewal application
- Go to the membership record and apply the changes

### Existing Details

Name	
Chapter	
Company	
Profession	
Speciality	
Description	

### Requested Changes

Name	
Company	
Profession	
Speciality	
Description	
Link to membership record to manually apply changes	<a href="#">CLICK HERE</a>
Link to approval screen to re-approve the renewal	<a href="#">CLICK HERE</a>

For more information contact your local BNI office or you can always reach out to BNI Connect support by submitting a request [HERE](#). We will be happy to help or get you in touch with the right people to assist.

Happy Connecting!

The BNI Connect Team

This email was sent as a system generated email, direct replies are not monitored.



# Renewal Approved



## Renewal Approved!

This notice has been sent to the Vice President, Secretary Treasurer, Membership Committee, Director Consultant and Regional Admin Team to inform you that a renewal has been approved. Please be sure to collect payment if it has not been done already and reconcile the transaction when ready.

## Renewal Details

Member Name	
Region	
Chapter	
Renewal Date	01/12/2021
Link to Membership Record	<a href="#">CLICK HERE</a>

For more information contact your local BNi office or you can always reach out to BNi Connect support by submitting a request [HERE](#). We will be happy to help or get you in touch with the right people to assist.

Happy Connecting!  
The BNi Connect Team

# Confirmation of Payment / Reconciliation Request

**BNI connect.**

## Renewal Payment Selected

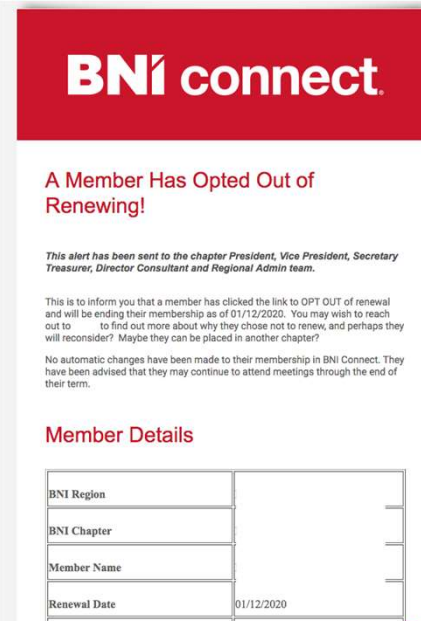
This notification is sent to the chapter Vice President, Secretary Treasurer, Membership Committee, Director Consultant and Regional Admin Team to inform you that a member has chosen their payment method as part of the renewal payment process. Please review your merchant account records or if a manual payment type has been selected check your mailbox in a few days.

## Renewal Details

Member Name	
Region	
Chapter	
Renewal Date	
Payment Type	Online Credit Card Payment
Payment Amount	714.00
Chapter Pending Application Screen	<a href="#">CLICK HERE</a>
Region Reconcile Application Screen (region admins only)	<a href="#">CLICK HERE</a>

# Alternate Outcomes for Renewal

- Membership Committee Approves Renewal with Conditions
- Membership Committee Declines Renewal
- Member opts out of Renewal



**BNI connect.**

**A Member Has Opted Out of Renewing!**

*This alert has been sent to the chapter President, Vice President, Secretary Treasurer, Director Consultant and Regional Admin team.*

This is to inform you that a member has clicked the link to OPT OUT of renewal and will be ending their membership as of 01/12/2020. You may wish to reach out to [redacted] to find out more about why they chose not to renew, and perhaps they will reconsider? Maybe they can be placed in another chapter?

No automatic changes have been made to their membership in BNI Connect. They have been advised that they may continue to attend meetings through the end of their term.

**Member Details**

BNI Region	[redacted]
BNI Chapter	[redacted]
Member Name	[redacted]
Renewal Date	01/12/2020

# Conflict Resolution

- Conflict resolution by Membership Committee
- Conflict resolution by Conflict Resolution Committee



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# Chapter Success Meeting

- All Leadership Teams must coordinate with their Chapter Consultant to set the dates & times for the full year
- All Chapter Success Meetings will be held on Zoom, using your Chapter Zoom Account
- The Vice President and all Membership Committee members must attend the full CSM each month
- (The President, Secretary-Treasurer, Visitor Host Coordinator & Mentor Coordinator attend the first half only.)
- It is expected that members who are presenting in the CSM are prepared in advance of the meeting.



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# The Leadership Team Resource Page

- **BNI Business Builder | Resources | Membership Committee**
  - Chapter Operations Manual
  - Request for Leave of Absence (Medical or Certificate of Credit)
  - Request for Transfer (to another chapter)
  - Transfer of company-paid membership
  - Accountability letters
  - Request for classification change

[bniltresources.com](http://bniltresources.com)



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# Where do I go for help?

- BNI Connect / BNI University – click on the ?
- The Leadership Team Resource page
- Your Chapter Consultant
- Bottom of the weekly Newsletter

Thank you!

