

Open Forum

Dues Campaign and Member Reconciliation



California Society

Secretary Forum



Dates to Remember

- December 15, 2020 — Cut-off date for Annual Member Dues.
- January 1, 2022 — CASSAR must have a clean roster.
- January 5, 2022 — Chapters report membership per CASSAR bylaws.
- January 5, 2022 — Chapter dues paid to CASSAR.
- January 31, 2022 — Chapter Change of Manager Forms due to State
- March 1, 2022 — Chapter Reports are to the state secretary.



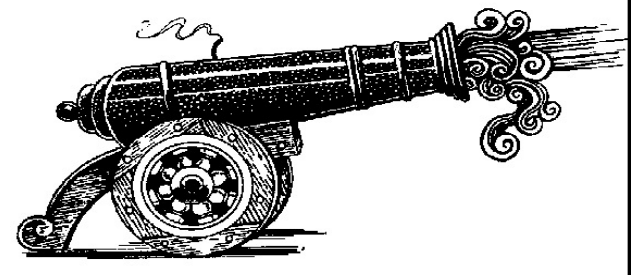
Why These Dates?

December 15th and **January 5th** are set by the **California Society bylaws** to provide sufficient time to prepare the California Society Membership and Financial Reconciliation Report that must be submitted to the National Society by the last working day in January.

NOTE: Transaction are not processed until the National Reconciliation Report is complete.

In 2022 the National Reconciliation Report and the CASSAR dues must be paid and must be filed by January 31, 2021, as set by NSSAR By-laws.

Let talk Transfers



What are they?

- Chapter to Chapter Transfers
- Transfer into California
- Transfers out of California
- Reinstatement - Transfers



Chapter to Chapter Transfers

Lets take the easy transfer first:

On the 7th and 9th Sheets of the Reconciliation Report is where transfers are listed.

When a member of the California Society transfers his membership from one chapter to another chapter, he does not have to be listed in the transfer into and the transfer out of the chapter.

The member is a member of the California Society, and the chapter where he is member is responsible for collection dues, or dropping the member.

This is easy for the chapters.



Transfers into the California Society

Transfers into the California society can be found on page seven (7) of the Reconciliation Report.

National Form 0919 Application for Transfer of Membership, is the correct form to use.

When a member transfers into the California Society, he must pay his California Society State dues for the current year and submit a Record Copy before his paperwork will be processed.



Transfers into the California Society

The transfer member must fill out the complete form and sign the first section and date the form.

The form must be signed by the Demitting State Secretary before being sent to the California Society State Secretary.

If the member does not do all of these steps, the application will not be processed properly.

All Transfers into the state are assigned a state number once a Record Copy is received and then the paperwork is processed.



Transfers out of the California Society

Transfers out of the California Society can be found on page ninth (9) sheet of the Reconciliation Report.

The form must be signed by the Demitting State Secretary before being sent to the California Society State Secretary.

If the member does not do all of these steps, the application will not be processed properly.

All Transfers into the state are assigned a state number once a Record Copy is received and then the paperwork is processed.



Transfers out of the California Society

National Form 0919 Application for Transfer of Membership, is the correct form to use.

Just like a Transfer into the California Society the form must be completely filled out and signed by the member.

The California society is the demitting state and has to verify that the member is in good standing and has paid his dues through the end of the current year, a record copy is sent with all transfers out of the state of California.



Reinstatements and Transfers Into the State

This is a special transfer – often a member has let his membership lapse in another state and wants to reinstate his members and transfer his membership at the same time.

This can be done; it depends on the length of time the member has let his membership slide.

If it has been longer than 12 continuous months and a full calendar year has lapsed then the member should use form 0918, and the form will be processed through the California Society only.



Reinstatements and Transfers Into the State

If it has been less than 12 months or it has not been a full calendar year has then the member it is a bit more complicated.

The member should use National Form 0918 and fill out the form in its entirety.

The transfer into California will need to pay his National, State and Chapter dues for the current year and submit a Record Copy with his application.



Reinstatements and Transfers Into the State

The California Society Secretary will confirm with the demitting state that the member was in good standing prior to letting his membership lapse and that he does not have any outstanding assets of the demitting state, before his application can be processed.

Just like any transfer into the state without a Record Copy the application will not be processed.

Remember all California Members have a California State number assigned before paperwork is signed and accepted.



Chapter Rosters

Just as in the previous past two years, *Chapters are required to submit complete chapter roster for **2021** and **2022**.*

Without both rosters your reconciliation report will not be accepted.



Reconciliation. Report Reviews

Each Chapters Reconciliation Report will be reviewed for glaring errors.

A note will be sent back to the chapter that the report has been accepted with a note regarding the amount of dues owed.

Adjustments to the report may be completed after the NSSAR report has been reviewed which could affect the amount of dues owed.



Reconciliation. Report Reviews

There are two (2) Reconciliations Reports that are completed at the State level;

(1) The chapter/state membership.

(2) The financial reconciliation of the correct amount of dues paid.

Both must agree before the Reconciliation Season is complete.



Reconciliation. Report Reviews

National and the California Society does not process **ANY** membership transactions until the both of the Reconciliation Reports are completed and the California Society signs off on the reports.

Each chapter will be sent a final number of the number of members in the Chapter as of January 1, 2022 that are are listed in the National Data Base. This is the Gold Standard.



New Members After December 15th

- New members that are received after December 15th 2020, National will make the correction in the Reconciliation Reports.
- New Members admitted before December 15th need to be included in the chapters Reconciliation Report.
- I keep a file on all applications received in December and will check your report and add new members if they are missing.
- Members that paid their dues after December 15th should be reported as dropped members and go through the process to reinstate.



Dual State Members

A **Dual State Member**, is a member that pays his National, State and Chapter dues in another state and only pays chapter and state dues to the California Society.

The Chapter must collect dues for all Dual California Society Members and to list them in the Reconciliation Report.

The chapter has the obligation to find out if the Dual Member has paid their National Dues through another state.

According to National bylaws, Dual state members cannot hold chapter or state executive board or committee chair positions in the state where they are a Dual member.



General Comments

- Fill in all fields in the work sheets.
- **Do not delete** any of the work sheets.
- **Do not change any of the formulas** on any of the sheets.
- Call me if you need assistant (909) 985-7510
- Did I say to Call me if you need Assistance **(909) 985-7510**



QUESTIONS



**Open for any Questions about the
2022
Reconciliation Report**