

Member Complaint Processing Checklist

Use the following guideline in processing a Member's complaint, in the order each item appears below. Initial and date each item as they are completed. Once complete, submit a copy to the BNI Regional Office.

1. Make Sure the Complaint Is:

- In Writing
- Based on Firsthand Experience
- From a BNI Member (this Chapter or any other)

2. Contact your Director prior to proceeding with the complaint process.

3. Assign a Fully Trained Membership Committee

4. Vice President Assigns Two Membership Committee Members to Interview:

- The party who filed the complaint
- The party against who the complaint is filed

5. Meet to Discuss the Findings

The full Membership Committee meets to discuss the findings. Was there a violation of the BNI Policies or BNI Code of Ethics? Determine the appropriate course of action toward a resolution.

- Coaching
- Probation
- Open Classification

6. Issue the Appropriate BNI Accountability Letter

Create the appropriate BNI Accountability Letter; Have Director/Director Consultant approve prior to mailing via certified mail

7. Notify Both Parties of the Decisions

Accountability Letters

- Accountability Letters can be downloaded in Word Form documents from BNI® University.
- These letters must be sent out fairly and consistently to all Members, without exceptions.
- Do not alter the BNI Accountability Letters. They have been approved by BNI attorneys.
- Date the letter; use the date in which it will be emailed.
Always sign the letters from "The Membership Committee"; never use an individual name.
- Always get your Director/Director Consultant's approval prior to sending an Open Classification or Probation letter.
- In all cases, these letters should be emailed to your Director/Director Consultant and the BNI Regional Office at the time it is mailed to the applicant/Member.



Timing Is Everything!

When a Member misses a meeting, an automated email is sent (based on PALMS submission) as a courtesy. In addition, when a Member loses an absence over time, a congratulatory email is sent. It is imperative the Vice President submits the PALMS report within 48 hours (or fewer) from the conclusion of each weekly meeting.

Letters for Non-Acceptance

- [Accountability Letter #01](#) Classification Conflict
- [Accountability Letter #02](#) Objections Filed by Members

Letters for Non-Attendance

- [Accountability Letter #03](#) Attendance Warning Letter/Second Absence
- [Accountability Letter #04](#) Attendance Warning Letter/Third Absence

Letters for Probation

- [Accountability Letter #05](#) Probation: BNI Code of Ethics Violation
- [Accountability Letter #06](#) Probation: BNI General or Administrative Policies Violation
- [Accountability Letter #07](#) Probation: Lack of Participation
- [Accountability Letter #08](#) Probation: Timekeeping
- [Accountability Letter #09](#) Probation: Disruptive Behavior in the Chapter

Letter for Opening a Classification

- [Accountability Letter #10](#) Opening a Classification for BNI Policy, Code of Ethics or Member Activity Violation

Letter for Declining a Membership Renewal Application

- [Accountability Letter #11](#) Declining a Membership Renewal Application





Member Complaint Processing Checklist

Use the following guideline in processing a member's complaint, in the order each item appears below. Initial and date each item as they are completed. Once complete, submit a copy to the BNI Regional Office.

Original Date of Complaint _____ Vice President Name _____
 Issue Name _____ Vice President Email _____
 Chapter Name _____ Vice President Phone _____

1. Make Sure the Complaint Is:

- In Writing Date Confirmed: _____ Initials: _____
- Based on First Hand Experience Date Confirmed: _____ Initials: _____
- From a BNI Member (this Chapter or any other) Date Confirmed: _____ Initials: _____

2. Contact your Director prior to proceeding with the complaint process.

Date Completed: _____

3. Assign a Fully Trained Membership Committee

Date Completed: _____

The following fully trained Membership Committee members are serving for the duration of this complaint through resolution:

Vice President Name: _____ Month/Year Trained: _____
 Membership Committee 1 Name: _____ Month/Year Trained: _____
 Membership Committee 2 Name: _____ Month/Year Trained: _____
 Membership Committee 3 Name: _____ Month/Year Trained: _____
 Membership Committee 4 Name: _____ Month/Year Trained: _____

4. Vice President Assigns Two Membership Committee Members to Interview:

- The party who filed the complaint (name): _____
 Interview by: _____ and _____
 On this date: _____
 Key elements of the conversation: _____
- The party against who the complaint is filed (name): _____
 Interview by: _____ and _____
 On this date: _____
 Key elements of the conversation: _____
 Member's reaction and response to the complaint: _____

5. Meet to Discuss the Findings

The full Membership Committee meets to discuss the findings. Was there a violation of the BNI Policies or BNI Code of Ethics? Determine the appropriate course of action toward a resolution.

Coaching

Probation

Date Completed: _____

Open Classification

Comments: _____

Resolution: _____

6. Issue the Appropriate BNI Accountability Letter

Date Completed: _____

Create the appropriate BNI Accountability Letter; Have Director/Director Consultant approve prior to mailing via certified mail

7. Notify Both Parties of the Decisions

Date Completed: _____