Using the New Renewal Notice / Billing System: Way to the Future

Rick Gathen, GL Membership and Marketing Manager Steve Meier: PSP, PDDGER, SR: Chair, Membership and Marketing, Area 8 Brian McCormick, Director, OSG Sera White, CEO Gravis Tech

For Reprints and PP contact: smeier@uidaho.edu 509-330-0547

Things You Will See in this Presentation

- Overview of the new billing system
- Results since system implementation
 - Implementation issues that have occurred and been resolved
- Information for Lodge Secretaries: Step by Step
 - Mailing / Postage issues that must be addressed
- Information for Members: Step by Step
- Where we go from here The future

Old Model

- Direct mail
 - Costs 55 cents / mailing / person
- Lodge picks up the cost for
 - Paper
 - Printing
 - Ink
 - Envelope
 - Return envelope
 - Credit Card Fee



Other Issues and costs

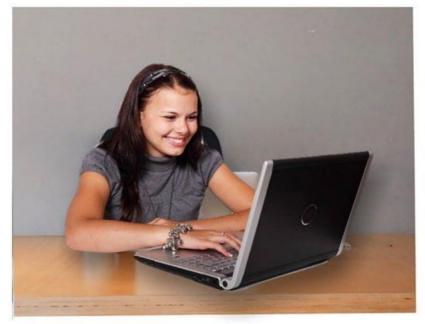
- Not for Profit Mailing Permit = \$275 / Yr.
- 200 piece minimum per mailing
- Need to be sorted by zip code for each mailing
- Does not include
 - Time to print the bill
 - Time to stuff the envelope
 - Travel and wait time at the post office
 - Other issues
- General Estimated cost
 - 77 cents to 1 Dollar / member





Lodge Secretary only - sign up access

https://www.elks.org/clms2web/osg.cfm





New Billing System

- Is Optional
- OPT IN when you want, OPT OUT when you want
- Modernizes payment options without adding fees
- Estimated Cost for renewal = 32 cents / member / renewal
- Cost did not increase with the new price increase from Postal Service
 - Includes
 - Postage, Paper, Ink, Envelope, Return Envelope, and Credit Card Fees (if Applicable)
 - Billed by Grand Lodge to the local lodge

New Billing System

- No minimum is required by the lodge
- No sorting by the Lodge Secretary
- No issues with printing, stuffing, sorting, etc.



Expected Fiscal Saving

- New method saves 42% to 68% depending on the Lodge
- Expected labor saving = 50 100 hours / year

Address Issues



GL Billing System

Lodge Secretary needs to correct addresses in CLMS ASAP

- If not corrected piece will be determined Undeliverable and discarded.
- Important for snow birds
- Members with Dues Waived need to be waived before submission of names to OSP

Other Information

- Members can pay by check, electronic check or credit card
 - Member pays convenience fees for EC or CC (about 3.5%)
 - Is noted on the invoice
- Form has optional donation boxes (ENF, Golf, Youth Activities, etc.)
 No additional letters are included Just the invoice
- Member can send in payment to the lodge by mail if desired.

- Reports are submitted to the Lodge Secretary daily
- No By-Law changes at the local lodge are required
- KEY: Lodge Secretary posts payments on CLMS and sends the membership card --- No Change from the past

How to Pay GL

- Lodge pays Grand Lodge via electronic transfer up front for the cost
 - Same as purchasing postage stamps before mailing

How To for Secretaries

• Go to CLMS, Click on Support

Home	Roster Reports	s Settings Officers/Comm	nittees/Auxiliaries	Accounting Options	Staff Messaging (1)	O Support			
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OSG Print and Online Presentment and Payment Enrollment Form (Step 1 of 2)

Please submit the form below to enroll your lodge in the new Grand Lodge <u>optional billing renewal program</u>. After submitting this form, you'll be asked to upload a voided check from your lodge checking account.

Questions? If you need more information about this program, please contact:

Rick Gathen Grand Lodge Membership & Marketing Manager Phone (773) 755-4904 - Fax (773) 755-4905 E-mail: <u>RickG@elks.org</u>

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Your Name: Joyce Powell Email Address: vpne2010@gmail.com By submitting this form, Lodge No. 1962 agrees to be invoiced 32 cents for postage, print, and mail services per member invoiced. Submit Registration	Hasbrouck Heights, NJ Lodg	No. 1962				
Email Address: vpne2010@gmail.com By submitting this form, Lodge No. 1962 agrees to be invoiced 32 cents for postage, print, and mail services per member invoiced.	Your Name:					
vpne2010@gmail.com By submitting this form, Lodge No. 1962 agrees to be invoiced 32 cents for postage, print, and mail services per member invoiced.	Joyce Powell					
By submitting this form, Lodge No. 1962 agrees to be invoiced 32 cents for postage, print, and mail services per member invoiced.	Email Address:					
 By submitting this form, Lodge No. 1962 agrees to be invoiced 32 cents for postage, print, and mail services per member invoiced. 	vpne2010@gmail.com					
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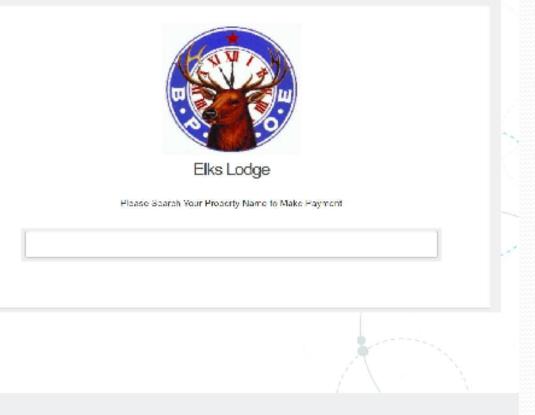
Elks - Online Payment Portal Information



A "how to" guide to the site

Search for your Elks Lodge

- You will use the following URL:
- <u>https://search.revopay.com/elkslodge</u>
- You will enter the lodge name or number in the space provided





Search for your Elks Lodge

- As an example, you will see the Lodge name and number
- Beneath the box there will be a highlighted link to select to open the payment page for the Lodge
- Click here to go to the payment page.... Will be what you see and select



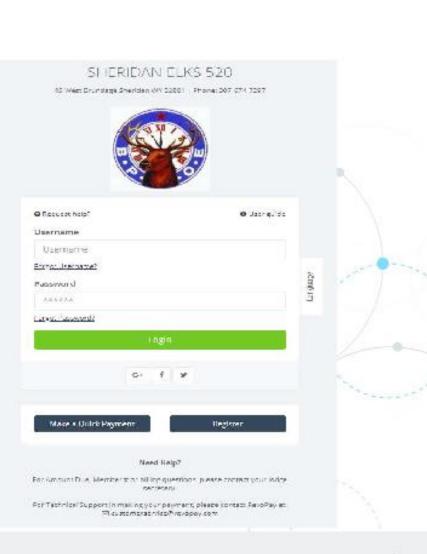
Elks Lodge

Please Search Your Property Name to Make Payment

Sheridan El	ks 520					
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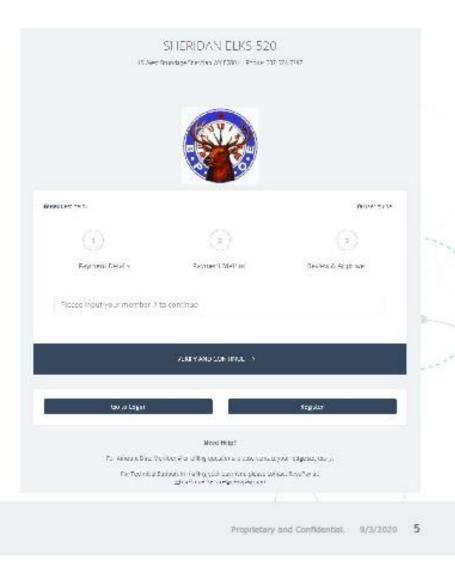
- Once on the payment page, you can register or make a quick payment (one-time, nonregistered payment)
- If you register, you can store payment info credit / debit card info for future payments
- You will need to enter your member number to register or make a quick payment
- If you don't have your member number, you will need to enter your first and last name to validate being part of the lodge





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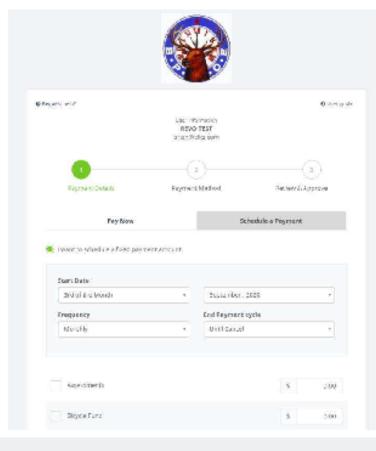
- Once the member enters their member number, they will see the items specific to your lodge to pay.
- The member will need to enter the amount as shown on the dues notice for Membership Dues and Grand Lodge / State Assessments.
- The additional contributions your lodge supports will be listed as well. The member will simply enter the amount they want to contribute.
- The member will enter their credit / debit card info and make the payment
- The member will receive a confirmation number of a successful transaction to keep for your records
- The transaction will be one amount and the detailed breakdown of the payment will be provided on the Admin site.





This slide is simply two screen shots showing the payment page dues, assessments and the additional contributions for the lodge.

The page will show this as 1 vertical column, however, I created this look of 2 images to just show an example of the page.



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This slide is simply a screen shot of the actual location where the member will enter their credit / debit card info and execute the transaction.

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Elks - Online Payment Portal Information - Admin Dashboard

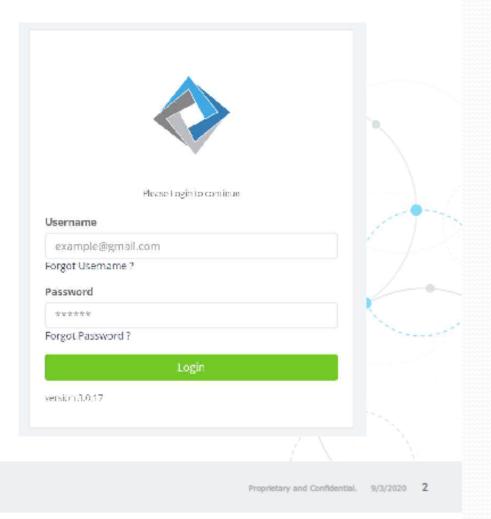


Lodge Administrator Info

Your Lodge Admin page

• You will use the following URL: app.revopay.com

- You will enter your username and password (provided by Brian @OSG)
- You will need to select your lodge name and number
- This will give you access to the admin site of your payment page to see the detailed information on the payments made by members





Lodge Admin Dashboard

- As an Admin of your lodge's site, you will have access to the settlement and transaction reports of payments made by your members.
- The Dashboard will give you a better view of payments, amounts, additional reports, etc..
- The Settlement report will be emailed to the email address on the Revo application as payments are made. If no payments are made, no report will be sent.
- The payments made by the member will be broken out for you to see the amounts for Dues, Assessments and the individual contributions a member has contributed to. The member will pay one amount, but the detail breakdown will be available to you on the site.
- · The next couple of slides will give you an idea of what you will see once in the site
- We will record a session of going through a site to show you what will be available to you once a payment is made. Brian will provide a link to this session



Lodge Admin dashboard

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Lodge Admin Dashboard continued

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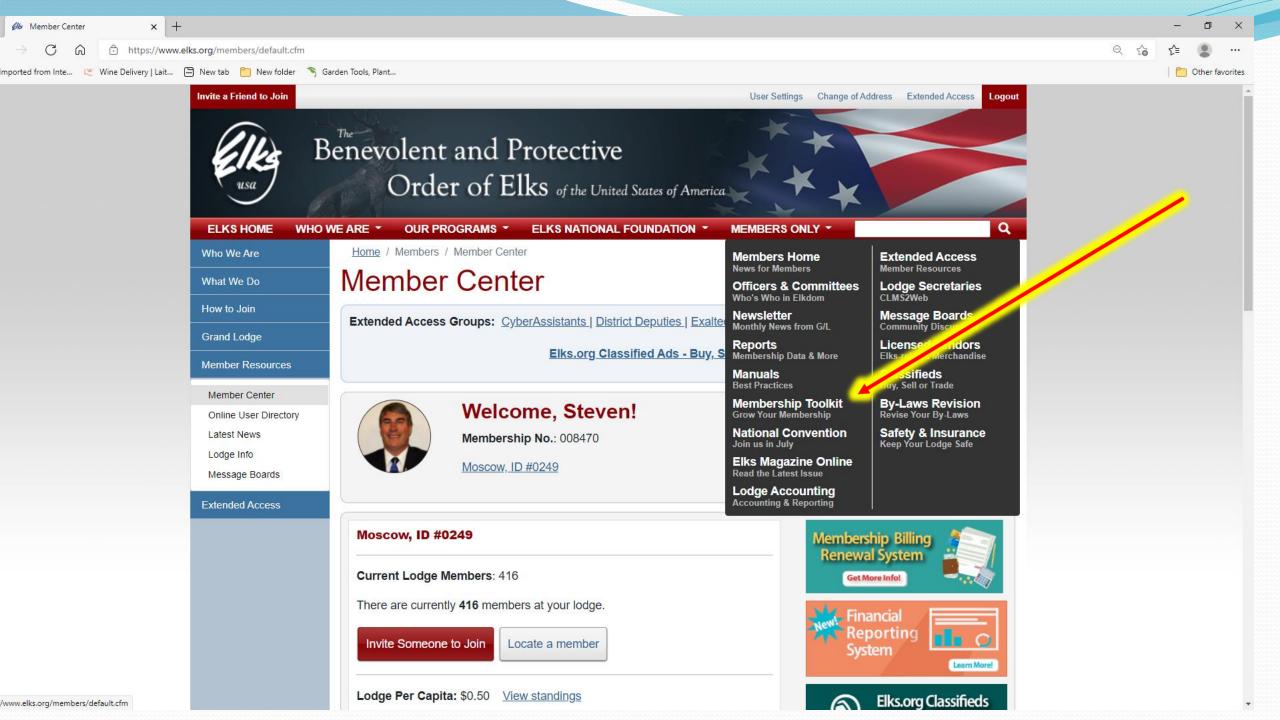
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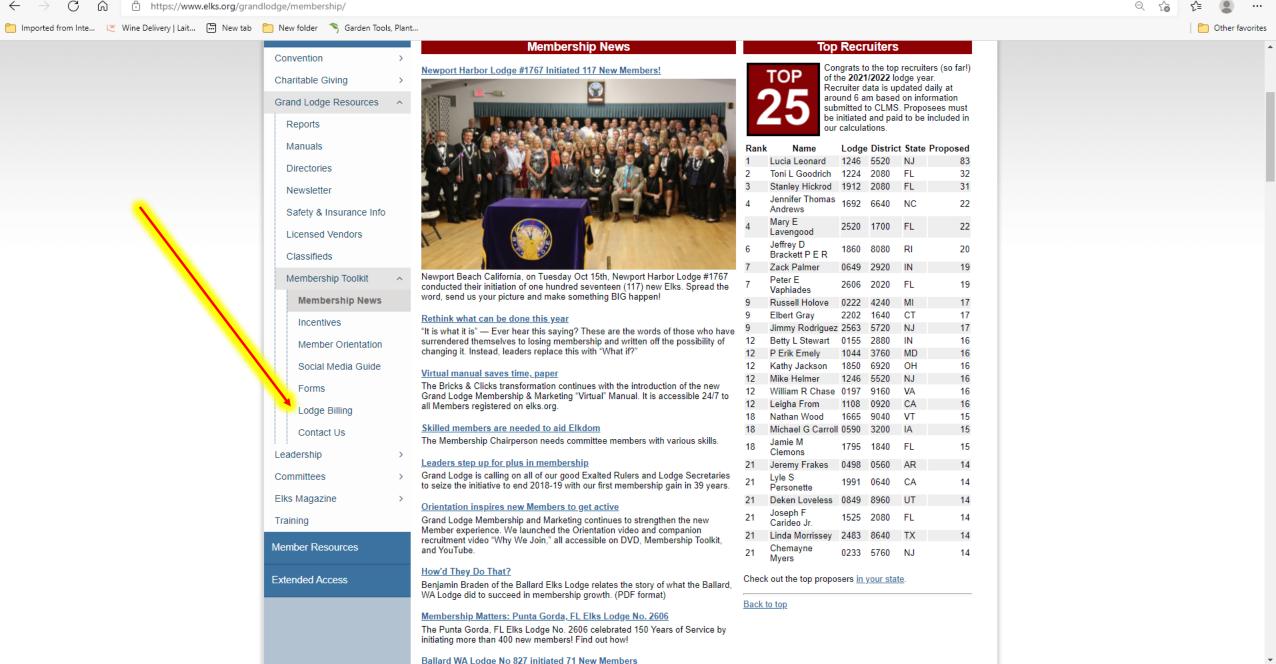
Hasbrouck Heights No 1962 DUES PAYMENT BY NAME AND TRANSACTION FOR

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			PLP/10 Capita	- (23) Regular - Prepaid GL Per	\$143.00	\$6.50		
			PLP/11	- (23) Regular - Prepaid State Fees	\$44.00	\$2.00		
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			PLP/14	- (8) Life - Prepaid State Fees 1	\$16.00	\$0.00		
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			CLP/20 Capita	- (1) Regular - Current GL Per	\$6.50	\$0.00		
			CLP/21	- (1) Regular - Current State Fees 1	\$2.00	\$0.00		
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			PLP/4M	- (8) Life - Prepaid GL Per Capita	\$52.00	\$0.00		
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			OD /52 FOUNDA	- (15) ELKS NATIONAL	\$270.00	\$0.00		
			OD /53 FUND	- (12) LODGE SCHOLARSHIP	\$120.00	\$0.00		
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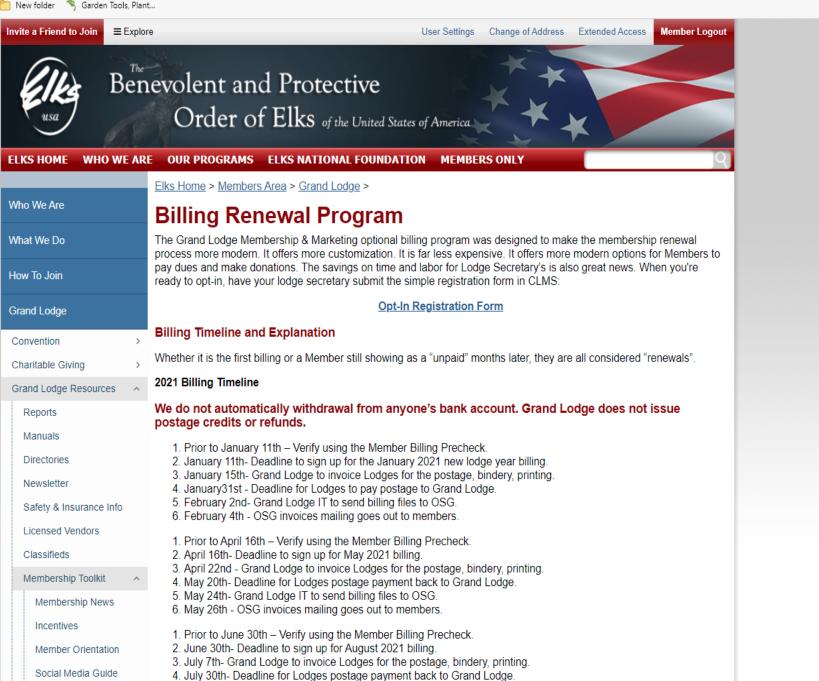
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Other favorites

Opt. Out and FAQs Sections

- If you've already registered to participate in this program, there's no need to opt-in again. You'll be automatically enrolled if all future mailings. If you'd like to cancel your participation, click the "Cancel our Participation" button online:
- <u>https://www.elks.org/clms2web/osg.cfm</u>NEW Optional Billing Renewal Program FAQs

Print Version to the Information

- <u>www.elks.org</u>
- Member's only
- Membership toolkit
- Lodge Billing

Using the New Renewal Notice System: Information for Members

Sample Invoice

Elks Lodge #782 201 Howard Blvd. Mt. Arlington, NJ 07856



ADDRESS SERVICE REQUESTED

4634000001 <834> Ալերենը-բունեիկիդեություրնկիլներերերեկինինինը JOE CUSTOMER 123 MAIN STREET ANYTOWN, USA 12345-6789 報道

Remittance Section

Statement Date

Member Number

BPOE Lodge Number

Total Amount Enclosed

Please make payable to:

DUES RENEWAL NOTICE

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Statement Date BPOE Lodge Number			August	01, 2020	
Member Number				12345	
Summary of Char	rges				
Description				Amount	
Regular - Current Dues 12 1	Nos			\$57.00	
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State Assessment Fee				\$2.00	
All amounts in U.S. Dollar	s		Total:	\$78.00	
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Elks National Foundation	\$10.00	Enclosed	\$		
State Major Project	\$10.00	Enclosed	\$		
Veterans Committe	\$10.00	Enclosed	\$		
Youth Activities Committe	\$10.00	Enclosed	\$		
Other Lodge Project	\$10.00	Enclosed	S		
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Total

HOW TO RENEW:



Fast, easy and secure: Online payments are now available. Log into www.revopay.com/elks and pay with a credit or debit card.

Pay by check via postal mail: Checks must be drawn on an account that will clear through a U.S. bank and accompany the form below via postal mail.

ELKS LODGE #782 201 HOWARD BLVD. MT. ARLINGTON, NJ 07856

782 12345

August 01, 2020

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Please detach and return above portion with your payment.



Your Membership in the Elks matters to our Veterans and our Youth. Even if you're not active as you would like, your Membership is making a difference in many lives in our community. We sincerely hope you will not allow your Membership to lapse. Please renew your membership TODAY. Pay

online with your credit or debit card.

Your Membership Matters and we need you!

Have you moved or changed your phone number?

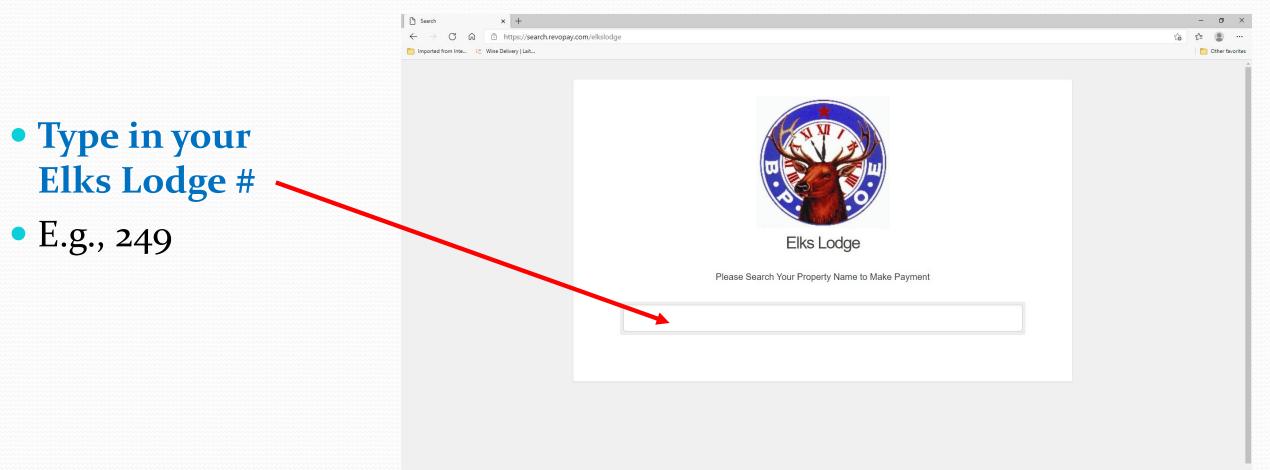
Please provide your new address or telephone number and return this portion with your payment. Your records will be updated on request.

Effective Date:	Account Name:			
New Address:	City:	State:	Zip:	
Contact Name:	Phone Number:			
Mark Number	Cigesture			

After Receiving the Billing Notice

- Identify what you want to pay on your paper notice
- Click on the following link found in the How to Renew Section
 - Search.revopay.com/elks lodge

The Link Takes you to this Page

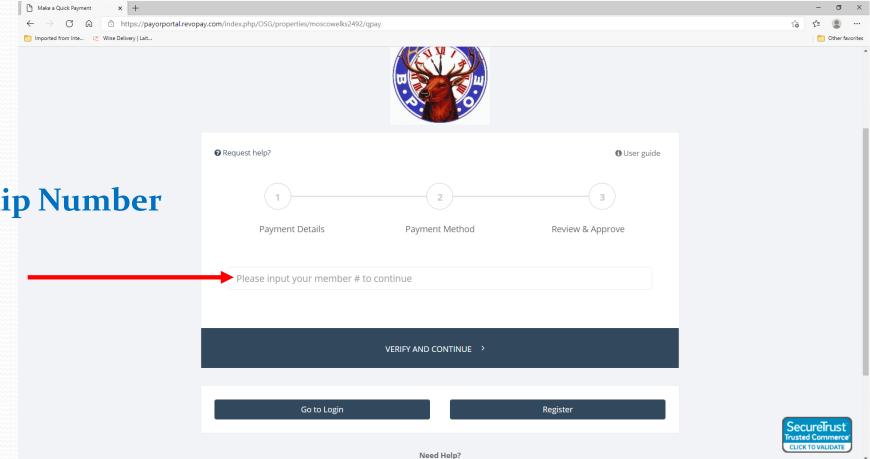


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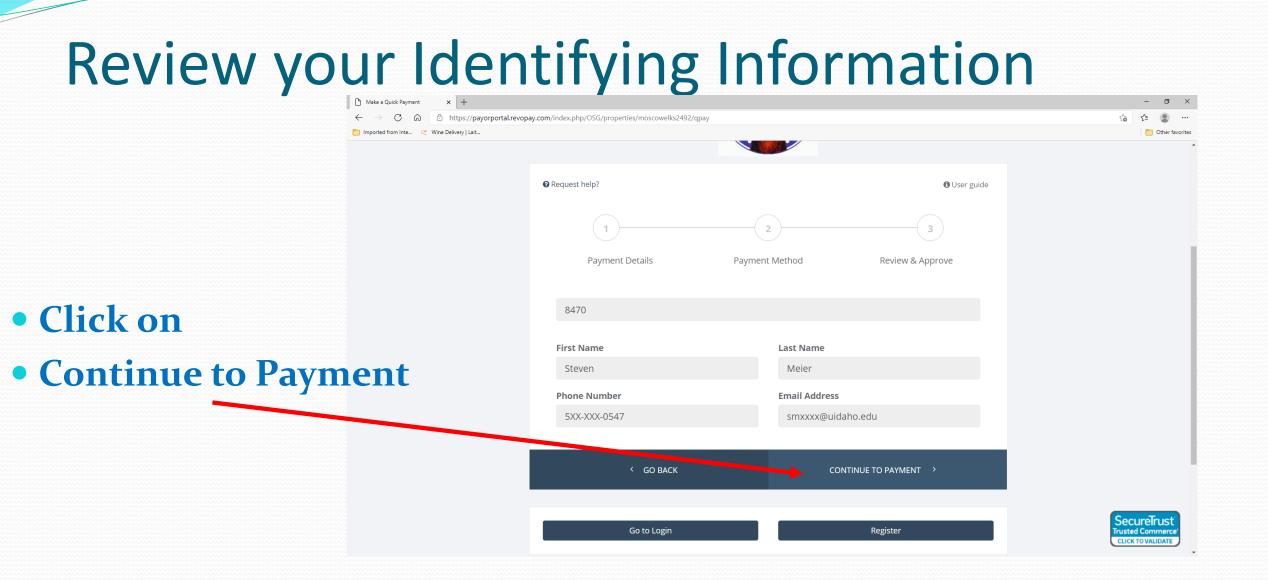
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- Click on
- Make a Quick
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• Insert Your Membership Number



Click on Options You Want to Pay For then Schedule a Payment **Pay Now** or × + Make a Quici o × \leftarrow С https://payorportal.revopay.com/index.php/quickpaystep2 τà. ≲≡ ... Imported from Inte... 📋 Other favorites 2 3) **Payment Details** Payment Method **Review & Approve** Pay Now **Schedule a Payment** 25th February, 2021 \checkmark Prepaid per capita dues and assessments \$ 24.50 Cart Shed Gas \$ 215.00 Range Ball Pass Single 115.00 \$ Range Ball Pass Family \$ 170.00 SecureTrust Lodge Charities \$ 5.00 usted Commerce CLICK TO VALIDATE

If Pay Now, Click on Select Payment Method

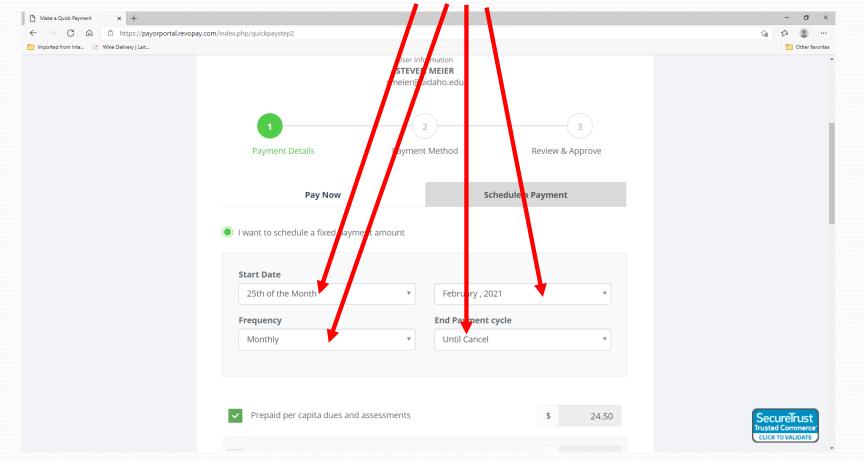
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	ELKS NATIONAL FOUNDATION	\$ 5.00	
	ELK REHAB SYSTEM	\$ 5.00	
	Golf Pass Family	\$ 720.0	
	Golf Pass Single	\$ 5.00	
	Cart Shed Electric	\$ 235.00	
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Follow Payment Details / Directions

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	My Payment Details			
	Making A OneTime payment To be o	charged on February 25, 2021 Paying:		
	Prepaid per capita dues and assess	sments	1 x \$24.50	
	Prepaid Dues		1 x \$100.00	
	Pay with Debit/Credit Car	rd VISA 🤐 📑 DISCOVER		
	Name on Card			
	John Smith			
	Your Card Number			
	000000000000000000000000000000000000000			
	Expiration Date	Zip Code		
	MM/YY	00000		
	Net Amount:		\$124.50	
	Convenience Fee: Click here to learn more about th			

D

If Schedule a Payment Follow the Schedule Directions

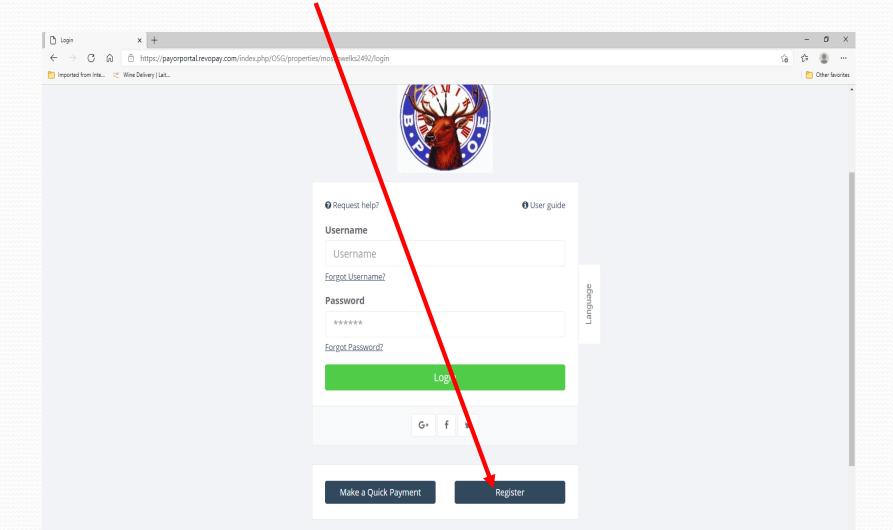


Click on Select Your Payment Method

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Make a Quick Payment × +			– o ×
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	Prepaid Dues	\$ 100.00	
	ELKS NATIONAL FOUNDATION	\$ 5.00	
	ELK REHAB SYSTEM	\$ 5.00	
	Golf Pass Family	\$ 720.00	
	Golf Pass Single	\$ 565.00	
	Cart Shed Electric	\$ 235.00	
	Subtotal:	\$124.50	
	Memo		
	< до васк	SELECT YOUR PAYMENT METHOD >	SecureTrust Trusted Commerce CLICK TO VALIDATE

Register for the Future



Reasons for Registering

- Once done, never need to do again
- Can change the times you want to pay
- Can change how much you pay / time
- Never need to think about it



- Automatic renewals and billing, never need to think about it
- Gets funds to your lodge faster
- Easier than other methods
- Less expensive than other methods

Results

• Since April 1

 Set new membership retention records 91% have paid their dues 24,120 six month delinquents 46,144 12 month delinquents 8,942 Members Reinstated Best Results Ever by this time

- Will have added 45,212 new members
 - Have 14,551 candidates in the pipeline



Other New Techniques

- New Post Card reminder
- Social media posts
- Membership Tool Kit
 - Membership
 - Marketing tools

Next Sign up Period

- 1. September 27th- Deadline to sign up for October 2021 billing.
- 2. September 30th- Grand Lodge to invoice lodges for the postage, bindery, printing.
- 3. October 5th OSG invoices mailing goes out to members
- 4.October 22- Deadline for Lodges postage payment back to Grand Lodge.

Note

• These are the times you need to be focusing on reminding members who have not paid their dues

Summary

- Great program for all lodges
- Will save your lodge money and Lodge Secretary Time
- Relatively easy to implement
- Can still use the same program if you desire
- Future Will see more changes as we go forward