

**MEMBERSHIP RENEWAL BILLING GUIDELINES FOR  
BOARD MANAGED BRANCHES  
FY 2021-2022**

**Definition of Membership Dues**

English-Speaking Union (ESU) membership dues are annual tax-deductible contributions to a national 501(c)(3) charity, providing financial support for the ESU at both the national and branch levels and demonstrating members' commitment to the mission and work of the ESU. A standing National Board resolution establishes a common membership/fiscal year throughout the branches (July 1 through June 30) with the initial billing for renewals taking place in or just prior to the first quarter of the fiscal year. A person is considered a member of the ESU if he or she has paid the \$35/50 national portion of membership dues to national anytime during the membership/fiscal year. The new 2021 fiscal year runs from July 1, 2021 to June 30, 2022. Membership dues collected pertain to the current fiscal year.

**Overview**

In accordance with Article XI Section 3 of the Board-Managed Limited Liability Company Operating Agreement, Headquarters conducts and administers membership dues billings in accordance with policies established in the Branch Operations Manual for billing members ("the ESU Billing Policies"). This year, on behalf of the branches, the ESU will plan, pay for, and execute four traditional paper dues renewal mailings. Headquarters will collect the dues and related information, and then reimburse branches their portion of dues and gifts. Headquarters will also update and maintain the membership database and branch rosters, which are accessible by authorized branch officers at any time.

- The initial membership renewal mailing, to be completed by July 1, 2021, will consist of two groups: 1) one to members and 2) one to current, lapsed, and former National Patrons. NOTE: For the second group, we will consider the "pool" of National Patrons for renewal anyone who has been a Patron in the last four membership years, whether or not they have renewed as a National Patron. For example, if someone was a National Patron in the membership year 2018-2018, but did not renew as a National Patron in 2018-2019, 2019-2020, or 2020-2021 (or renewed as regular member), that person will be asked to renew as a National Patron and will be solicited as part of that group.
- The initial mailing will include an Appeal Letter, ideally from the Branch President, a personalized membership renewal form, and a separate appeal – from the President of the ESU – to renew as a National Patron or to become a National Patron.
- Members may renew online via their branch web page or by returning the personalized membership renewal form with payment (check or credit card) to Headquarters via mail.

- As Headquarters receives and processes membership renewals, staff will update the branch rosters. Through these on-line rosters, Branch Officers are able to monitor the changes and updates to their branch's membership data at any time.
- Dues reimbursement checks will be processed monthly and sent to Branch Treasurers beginning in mid-August. However, as funds from the "Fourth Quarter Bonus" for lapsed and due members has been held until the new fiscal year, branches can expect the first check to arrive in early July. They will include all branch dues and gifts that Headquarters received and booked by the end the previous month.
- Headquarters will send each renewing member a Membership Card, a letter acknowledging receipt of his or her payment, which can be used a tax receipt, and a personalized thank you letter from the Branch President, if one is provided by the branch.

Prior to the renewal mailing (**no later than Friday, June 25, 2021**), branches should provide:

- Appeal letters: Branch Presidents are responsible for writing a personal appeal letter to their branch members encouraging members to renew. We will include this letter in the first paper mailing. The appeal letters should be personal, encourage members to renew and upgrade, and invite members to specific upcoming events. Please provide the draft text for your letter along with a scanned version (preferably in blue ink) of your signature, and we will reproduce it on appropriately branded and approved ESU letterhead, personalized to your branch. If the branch does not provide text for the appeal letter by June 22, Headquarters will draft one up for signature by the Chair of the National Board of Directors.
- Thank you notes: branches may elect to write thank you letters to renewing members. If so, please provide draft text and a signature that Headquarters can use to create a "template" (or fill in the blanks) letter that it can print and include with the membership cards and the formal acknowledgement letter (tax letter) sent to all renewing members.
- Membership Renewal Form: Branch Presidents (or designated officer) must confirm with Headquarters the branch's current dues structure, including categories and amounts, and solicited contribution levels and funds no later than **June 25, 2021**. If Headquarters does not receive this information by then, we will assume that your branch dues structure has not changed. The Branch President must also review (and request edits, if necessary) the membership renewal form provided by Headquarters and approve the document for use.
- Membership Roster: Branch Membership Chairs (or other appropriate officers) review, update, and approve the Membership Roster, which will be used as the basis for the renewal mailing. This must be approved by June 25, 2021. If not, Headquarters will assume the roster is accurate and will use it for the membership renewal appeal. Lapsed members retained on the roster may also be included in the mailing as the branches direct. Changes in a member's address, phone number, membership status (single or couple), and drops should be reported to Kathy Morrisett at [kmorrisett@esuus.org](mailto:kmorrisett@esuus.org)

With your help, all membership renewal mailings (there will be four of them) will take place by

November 15, 2021 to allow ample time to re-engage “Due” members as early as possible. branches can request that additional documents be included in their mailings, provided that they do not increase the cost of postage. Envelopes will be labeled “Membership Materials Enclosed” and will be sent “Address Correction Requested.” When undeliverable mail is returned, Headquarters will alert the branch. Headquarters will not drop an individual from the roster until he or she has had every opportunity to renew his/her membership for up to three years.

#### Reimbursing the Branch Portion of Dues to the Branch

The National portion of member dues remains \$35 for a single (\$33 for a younger single) and \$50 for a couple (\$47 for a younger couple) and will be retained at Headquarters while we return the remainder to the branch with a report indicating to which members the reimbursements apply. We will do this monthly, beginning in mid-August.

In addition to the *On-line Membership Roster*, a *Paid Members Report*, and *Owed Members Report* and a *Dropped Members Report* are available at any time from Kathy Morrisett, Membership Secretary, at [kmorrisett@esuus.org](mailto:kmorrisett@esuus.org).

#### Submitting New Memberships

Any dues for new memberships collected by the branch should **not** be deposited in branch accounts but forwarded to Headquarters for processing. branches should send the complete amount of all new dues payments (all checks and forms) to Headquarters. Dues payments from new members and their member contact information should be submitted to Headquarters promptly in order for new members to receive their tax/acknowledgement letters, membership cards, and welcome packets. **NOTE:** Headquarters can only issue tax letters/acknowledgement and membership cards to the entity that submits the funds. So if new members join, send their checks and registration materials to Headquarters for processing, and Headquarters will return the branch portion of dues in the monthly reimbursement check.

But, for example, if a Branch sends only \$35 from the branch for a new member, Headquarters will only acknowledge receipt of \$35 from the branch **to the branch and not to the member**, as Headquarters did not receive the funds directly from the member. In this case, the branch will be responsible for sending the appropriate tax/letter to the donor, confirming the receipt of whatever amount from the member, and membership cards.

If branches enroll new members or renew members during the last quarter of the membership/fiscal year (April 2021 - June 2021), these members will be granted a complementary extension of their membership through June 2022. **For this year, this pertains to new members and also lapsed or due members.**

Listed below is the current schedule, subject to change, for the FY 2021-2022 Billing Cycle

**FIRST APPEAL**

June 29, 2021      Hard copy/paper mailing to members and all National Patrons and former National Patrons going back to 2017-2018 are mailed for delivery by July 1, 2021. National Patron Appeal includes a personal note from ESU Quinn Peeper as well as info about the annual National Patron Party/Reception during the Annual Conference if details are available.

**SECOND APPEAL**

August 16, 2021      First reminder sent by a hard copy/paper mailing to all those who have not responded to the first appeal by August 10. This will go to both groups of members and National Patrons.

**THIRD APPEAL**

September 27, 2021      Second reminder sent by a hard copy/paper mailing to all those who have not responded to either the first or second appeal by September 22. This will go to both groups of members and National Patrons.

**FOURTH AND FINAL APPEAL**

November 15, 2021      Third and final reminder sent by a hard copy/paper mailing to all those who have not responded to either the first or second appeal by November 10. This will go to both groups of members and National Patrons.

**NOTE:** The billing cycle for the Palm Beach and Naples Branches differs from the schedule above to accommodate their unique situations. Consult Kathy Morrisett for those schedules.