



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 your Director/Coach.

Original Date of Complaint: _____ Vice President Name: _____

Chapter Name: _____

1. Make Sure the Complaint Is:

- In Writing, when possible Date Confirmed: _____ Initials: _____
- Based on Firsthand 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 Name: _____ Month/Year Trained: _____
- Membership Committee Name: _____ Month/Year Trained: _____
- Membership Committee Name: _____ Month/Year Trained: _____
- Membership Committee 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 (facts and timeline): _____

- The party against who the complaint is filed (name):
Interview by _____ and _____
On this date: _____

Key elements of the conversation (facts and timeline): _____

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
- Open Classification

Date Completed: _____

Comments: _____

Resolution: _____

6. Issue the Appropriate BNI Accountability Letter

Date Completed: _____

- Probation - Written approval from the Director/Coach that the process was followed
- Open Classification - Written approval from the Executive Director/US CORE Managing Director for the action

7. Issue the Appropriate BNI Accountability Letter

Date Completed: _____

Create the appropriate BNI Accountability Letter; Have Director/Director Consultant approve prior to emailing with a read receipt, when possible

8. Notify Both Parties Appropriately

Date Completed: _____