



CDPI Event Invoice Policy

Event invoices that are 30 days old will be sent an email by the event representative to fulfill their invoice (either someone from the professional development committee or conference planning committee, depending on the event it is for). After 60 days, another email will be sent by the Treasurer informing them their account is "locked" until all outstanding event invoices are paid. This means we will not allow them to register for anything else until they are paid. Internal Notes will be put next to the invoices in Wild Apricot, noting when and who has communicated with that person. New Member Level- "Needs Attention" for unpaid event invoices.

This policy will be shared in all our email communications we send out as we start sending save the dates for events, in order to give everyone plenty of time in advance (multiple months) to renew their membership if needed, and register for the event. We understand our higher ed institutions can take time, so we will encourage our members to plan far ahead and start the process if they want to register at a discounted member rate. If they are not able to renew their membership before an event, they will have to register at the non-member rate; there will be no exceptions.

For our annual conferences, the registration committee will be responsible for sending communications to registrants and following up about unpaid invoices 30 days after the event, then the Treasurer will email them after 60 days.

For our professional development events, the professional development committee will designate someone responsible for sending communications to registrants and following up about unpaid invoices 30 days after the event, then the Treasurer will email them after 60 days. The Director of Member Services will serve on this professional development committee since that role so closely aligns with this process.

Updated 5/2017