

# Maryland State Checklist (2020 - 2021)

Council: \_\_\_\_\_

Date: \_\_\_\_\_

CATEGORY	QUESTION:	ANSWER:	ACTION:	FOLLOW-UP
<b>Recorder</b>	Are ALL meetings recorded into an official record book?			
	Are Records complete?			
	Are Records attached to book?			
	Are meeting minutes sent to members by any means? (NO is desired answer)			
<b>Financial Secretary</b>	Were dues notices mailed by Dec 15? Amount of Dues \$__			
	Was 2nd Notice sent on Jan 15?			
	Were names of delinquents forwarded to the retention committee by Feb 1?			
	<i>Are Knight Alerts being used under Supreme Guidelines?</i>			
	How many members are in arrears as of _____ How many are < 1 year > 1 year			
	Are membership records reconciled with GK?			
	Are Form 100's sent to insurance Agency immediately after the exemplification?			
	Is the FS using current member management tools?			
	Is FS using member management for finances?			
	Are member records being kept up to date i.e. degrees, address changes, deaths?			
	Are proper financial procedures being followed? i.e. Does FS receive ALL funds?			
	Are receipts used to document funds transfer to the treasurer?			
	Are membership cards being issued properly?			

# Maryland State Checklist (2020 - 2021)

Council: \_\_\_\_\_

Date: \_\_\_\_\_

CATEGORY	QUESTION:	ANSWER:	ACTION:	FOLLOW-UP
	Are disabled members being handled properly?			
	Is additional bonding needed? Is it in place?			
	Is financial information for squires in place? If applicable			
	Is the FS aware he can be compensated (8 - 10 % of dues collected)?			
	Do Financial Secretary's records show funds received?			
	Do Financial Secretary's records show funds disbursed to the treasurer?			
	Does FS attend MOST meetings?			
	Has IRS form 990 been submitted by May 15?			
<b>Treasurer</b>	Are funds deposited promptly after he receives them from the FS?			
	Are the Treasurers books in order?			
	Does the Treasurer have possession of the council check book MOST of the time?			
	Does the Treasurer sign all checks and countersigned by GK?			
	Does the Treasurer have a checkbook that has two signature lines and creates a copy of the check?			
	Does the Treasurer attend MOST meetings?			
<b>Grand Knight</b>	Is the GK managing the Council in accordance with the Supreme and council by-laws?			
	Are the Supreme, State and Chapter assessments paid on time?			

# Maryland State Checklist (2020 – 2021)

Council: \_\_\_\_\_

Date: \_\_\_\_\_

CATEGORY	QUESTION:	ANSWER:	ACTION:	FOLLOW-UP
	Are required meetings held EACH month?			
	Is Report of Officers Chosen submitted (Form 185)?			
	Is Report of Service Personnel submitted (Form 365)?			
	Is Semi-annual Audit completed for the last 6 months?			
	Did the council submit the Fraternal Survey? by 1/31?			
	Did the council submit the quarterly Maryland State activity reports on time?			
	Are other Reports submitted and ON TIME?			
	Is the DD copied on ALL Official Correspondence going to the state or Supreme?			
	Is an admissions committee established? Is the Chaplain consulted as needed?			
	Does Council use a Retention Committee other than the FS? Is it effective?			
	Does the Council use an Advancement Committee? (when needed) Is it effective?			
	Is program structure proper?			
	Does GK attend required state and district meetings?			
	Does GK follow order of business? (Sec 125 by-laws)			
<b>By-Laws</b>	When were the council by-laws last approved?			
	Are dues collected in accordance with Council By-Laws?			
	Are ALL CHAIR Officers attending MOST meetings?			