|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Are Supreme and state guidelines being followed with regard to potential affiliate membership? |  |  |  |
|  | How many members are in arrears as of Feb 15? How many are < 1 year > 1 year |  |  |  |
|  | Are membership records reconciled with GK? |  |  |  |
|  | Is the insurance Agency immediately notified after an 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 and timely? |  |  |  |

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| --- | --- | --- | --- | --- |
| **CATEGORY** | **QUESTION:** | **ANSWER:** | **ACTION:** | **FOLLOW-UP** |
| **Recorder** |  |  |  |  |
|  | Are ALL meetings recorded into an official record book? |  |  |  |
|  | Are Records complete? |  |  |  |
|  | Are Records attached to book? |  |  |  |
|  | Are meeting minutes sent to members by secure means? |  |  |  |
| **Financial Secretary** |  |  |  |  |
|  | Were dues notices mailed by Dec 15? Amount of Dues $\_\_ |  |  |  |
|  | Was 2nd Notice sent on Jan 15? |  |  |  |
|  | Were names of delinquent members forwarded to the engagement committee by Feb 1? |  |  |  |