

# Maryland State Checklist (2023 - 2024)

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 secure means?			
<b>Financial Secretary</b>				
	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 15?			
	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 and authorize all council checks?			
	Are receipts used to document funds transfer to the treasurer?			
	Are membership cards being issued properly and timely?			

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

CATEGORY	QUESTION:	ANSWER:	ACTION:	FOLLOW-UP
	Are disabled members being handled properly?			
	Is additional bonding needed? Is it in place?			
	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 mtgs?			
<b>Treasurer</b>				
	Has IRS form 990 been submitted by 15 <sup>th</sup> day of 5 <sup>th</sup> month after close of accounting period?			
	Are funds deposited promptly after receiving them from FS?			
	Are the Treasurer's books in order?			
	Are all council checks signed by the treasurer and authorized by the Grand Knight and Financial Secretary?			
	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?			

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

CATEGORY	QUESTION:	ANSWER:	ACTION:	FOLLOW-UP
	Are two required meetings held EACH month?			
	Is Report of Officers Chosen up to date (Form 185)?			
	Is Report of Service Personnel up to date (Form 365)?			
	Is Semi-annual Audit submitted by Feb 15 & Aug 15?			
	Did the council submit the Fraternal Survey? by 1/31?			
	Did the council submit the Program activity reports to Supreme?			
	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 the Council use an Engagement Committee? Is it effective?			
	Are the council Youth Protection requirements completed by July 31?			
	Is program structure proper?			
	Does GK attend required state and district meetings?			
	Does GK follow current script for monthly council meeting?			
	Does GK authorize all checks with Financial Secretary?			
<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?			