

# FORMS & RETENTION

## Tools to Measure Our Success

The image shows a 'Membership Document' form from the Knights of Columbus. It includes fields for 'TRANSACTION' (New Member, Renewal, etc.), 'COUNCIL TO JOIN', 'MEMBERSHIP QUOTA', and 'COUNCIL OFFICERS'. There are checkboxes for 'RENEWAL' and 'RENEWAL QUOTA'. The form is titled 'MEMBERSHIP DOCUMENT' and 'A KNIGHTS OF COLUMBUS A CATHOLIC FAMILY FEDERAL SERVICE ORGANIZATION'.



Fill out Form

The image shows a 'Star Council Checklist' form from the Knights of Columbus. It includes sections for 'Service Program Progress Report Form #345 - Due August 1', 'Financial Summary of Financial Activity Form #1728 - Due January 31', 'Maturity Award - Membership Quota of', 'Youth Award - Insurance Quota of', and 'Columbian Award Report Form #197 - June 30'. There are checkboxes for 'All Council Assessments paid by June 30'.

Membership Conservation & Forms Chairman

Al Urban

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# COUNCIL FORMS CHECKLIST

- Illinois State Council:

- DIR1 State Directory information sheet

- To be submitted immediately following election of officers for the next fraternal year.

- This form provides communication to the council.

- Illinois SP-7

- First Submission by September 15<sup>th</sup> to be utilized as a planning tool for the year

- Final Submission by June 15<sup>th</sup> (to qualify for State Awards) attach copy of SP7 to this form

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# COUNCIL FORMS CHECKLIST

- Supreme Council:
  - Form 185 Council Officers for the fraternal year.  
To be submitted immediately following the election of officers for the fraternal year.  
Due to Supreme no later than July 1
  - Form 365 Service Program Report.  
Should be submitted within 30 days of Council election.  
Due to Supreme no later than August 1
  - Form 1728 Annual Survey of Fraternal Activity. Due to Supreme by January 31<sup>st</sup>  
Important form as this form is necessary for the Knights of Columbus to retain Charitable Status with the US Government.

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## **COUNCIL FORMS CHECKLIST**

- Form 1295 Semiannual Audit Report (as of June 30<sup>th</sup>)  
Due to Supreme no later than August 15<sup>th</sup>; paper mail submission only
- Form 1295 Semiannual Audit Report (as of Dec 31<sup>st</sup>)  
Due to Supreme no later than February 15<sup>th</sup>; paper mail submission only
- Form 2863 Application for Refund Support Vacations Program.  
Due to Supreme between April 1 and June 30
- Form SP-7 Columbian Award Application.  
Due to Supreme by June 30<sup>th</sup>

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## **COUNCIL FORMS CHECKLIST**

- Form 2630 Annual Report of Knights of Columbus Roundtable.  
Due to Supreme by June 30<sup>th</sup>
- Form 4584 Partnership Profile Report with Special Olympics.
  - For 12 Month Period Ending December 31
  - Due by January 31
  - Very important to submit, as it affects the donation that the State receives from Supreme to donate to Special Olympics, IL

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## **COUNCIL FORMS CHECKLIST**

All Illinois State Council Forms can be found using the below URL:

<http://www.illinoisknights.org/mary/forms/forms.php>

All Supreme Council Forms can be found using the below URL:

<http://www.kofc.org/un/en/officers/forms/council.html>

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