



# 4-H Charter Completion Guide

June 2020

This guide is for 4-H volunteer leaders and officers as they prepare the 4-H Charter Applications and Renewal Packets.

- 4-H Club and Group Charters are issued at the time a new 4-H club or group is formed.
- The charter year is *November 1 to October 31*.
- Charters are renewed annually and will be granted upon successful completion of the *Wisconsin 4-H Annual Charter Renewal* packet.
- All sections in the packet must be completed by the 4-H volunteer club or group leadership team for the renewal year of this application.
- Youth officers and members are expected to be involved in this process.

**Deadline for submission:** Initial applications for a 4-H Charter are submitted at the time the 4-H Club or Group is formed. For the annual renewal, the financial portion (pages 5-6 & supporting documents) of the 4-H Charter Annual Renewal packet is due by the County due date or *September 1*, whichever comes first. The full packet is due by the County due date or *November 1*, whichever comes first. Consult with the 4-H Youth Development Educator.

**4-H Club Name:** \_\_\_\_\_

- \_\_\_ 1. **For new club or groups only:** On the Articles of Organization, are all the spaces filled & completed? (pages 1-2)
- \_\_\_ 2. Is the 4-H Club or Group's adult leadership name and contact information complete for the charter year November 1 through October 31? (page 1 for renewals, page 3 for new clubs or groups)
- \_\_\_ 3. Are the questions regarding Club or Group meeting information answered? (page 1 for renewals, page 3 for new clubs or groups)
- \_\_\_ 4. Does the 4-H Club or Group have written operating guidelines or bylaws?
- \_\_\_ 5. Does the 4-H Club or Group meet the minimum requirements? (page 2 for renewals, page 4 for new clubs or groups)
- \_\_\_ a. Does the club have five or more youth from at least three families?
- \_\_\_ b. Have all adult leaders been approved through the UW-Extension Volunteer in Preparation (VIP) Youth Protection process?
- \_\_\_ c. Did one or more leaders attend the required annual Volunteer Leader Team Training? (Note: this is not the VIP Orientation training)
- \_\_\_ d. Does the 4-H Club or Group meet on a continuing basis?
- \_\_\_ e. Is the 4-H Club or Group open to any youth eligible for 4-H membership?
- \_\_\_ f. **Mastery:** Educational plan involving business, community service, education, and recreation/socialization, which meets the purposes of the 4-H environment.
- \_\_\_ g. **Generosity:** Youth have opportunities to contribute through community service.
- \_\_\_ h. **Independence:** Youth involvement in leadership and decision-making.
- \_\_\_ i. **Belonging:** Youth and adults create a welcoming environment for all members and families
- \_\_\_ j. Are adult and youth volunteer signatures in place for charter completion?

- \_\_\_ 6. Are the SMART goals in the Educational Plan for the year of the 4-H Club or Group completed? Please center one goal around expanding access, and one goal around program quality. See the supplemental document for ideas. (page 3 for renewals, page 5 for new clubs or groups)
- \_\_\_ 7. Is a 4-H Club or Group Calendar attached or has the calendar planner been completed? Do they clearly communicate that business, education, and recreation is happening? (page 4 for renewals, page 5 for new clubs or groups)
- \_\_\_ 8. Is the Annual Financial Report complete? (page 5-6 for renewals, pages for 6-8 for new clubs or groups)
  - \_\_\_ a. Is the EIN (Employee Identification Number) listed? (page 5 for renewals)
  - \_\_\_ b. Are beginning balances (July 1) and ending balances (June 30) for all accounts completed for all financial accounts and totaled? (page 5 for renewals, page 7 for new clubs or groups)
  - \_\_\_ c. Are all funds received and disbursed identified in the correct category and totaled? (page 5 for renewals, page 7 for new clubs or groups)
  - \_\_\_ d. Does the difference in the total reconciled funds in the financial accounts match the difference in the total of funds received and disbursed? (page 5 for renewals, page 7 for new clubs or groups)
  - \_\_\_ e. Is a bank statement ending June 30 for each account held by the 4-H Club or Group that reflects account balance for the end of the fiscal year attached? (page 6 for renewals, page 8 for new clubs or groups)
  - \_\_\_ f. Are all 4-H financial accounts identified and those that have authorization to use the accounts? (page 6 for renewals, page 8 for new clubs or groups)
  - \_\_\_ g. Have the 4-H accounts been reviewed? Have the financial reviewers signed and dated the Annual Financial Report? (page 6 for renewals, page 8 for new clubs or groups)
  - \_\_\_ h. Have the 4-H Adult Volunteer Leader and 4-H Club or Group Treasurer signed and dated the Annual Financial Report? (page 6 for renewals, page 8 for new clubs or groups)
- \_\_\_ 9. Has the complete 4-H Charter Application or 4-H Charter Renewal packet been turned into the 4-H Youth Development Educator to UW-Extension Office by the due date?
- 10. Additional information requested: (please use back of page as needed)

a. How has the 4-H club used the information from the 4-H Annual Volunteer Leader training?

b. What additional resources or training is needed by the 4-H volunteers in the 4-H Club?