



UW-MADISON EXTENSION

4-H Charter Renewal Completion Checklist

July 2020

This guide is an optional tool for 4-H volunteers and staff as they prepare the 4-H Charter Renewal Packets for submission.

Financial Report* Due Date: _____ Complete Packet Due Date: _____

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|------------------------|--|
| County | |
| 4-H Club or Group Name | |

To be authorized to use the 4-H Name and Emblem, all 4-H Clubs and Groups must complete and return the Charter packet to the County UW-Extension Office, including:

1. Wisconsin 4-H Charter Application or Reapplication Document (pages 5-6 due w/financial report)*
2. Completed 4-H Club or 4-H Group Audit Checklist*
3. Copy of the checkbook and/or savings registry covering July 1 – June 30*
4. June or July ending bank statement*
5. Current 4-H Club or 4-H Group bylaws
6. Annual 4-H Club or 4-H Group calendar covering October 1 – September 30

Please remember:

- 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 the process.

| Charter Document | Critical Components | Volunteer Leader | 4-H Educator |
|--|--|------------------|--------------|
| Annual Financial Report (pp. 5-6 in charter packet; supporting documents) Due Sept. 1 to County Extension Office | All blanks are complete, including dollar amounts. If there is not an amount, enter zero (0). | | |
| | All 4-H financial accounts are identified as are those who are authorized to use the accounts. | | |
| | Fundraising, Member Dues, and Donations compose of at least 1/3 of funds received. | | |
| | The ending balance (D) must be equal to the funds listed under (A) Beginning Balance plus (B) Total Funds Received minus (C) Total Funds Disbursed A+B-C=D. | | |
| | *The 4-H accounts have been reviewed and financial reviewers have signed and dated the financial report in the charter document and the 4-H Audit Checklist . The checklist is included in the submitted financial report. | | |
| | *A copy of the checkbook and/or savings registry covering July 1 - June 30 is included in the submitted financial report for each account. | | |
| | *A copy of the June or July ending bank statement(s) is included in the submitted financial report. | | |
| | Please check here if the Club/Group had income of \$20,000 or more for the 2019-2020 fiscal year. | | |
| Educator has entered financial details of Clubs/ Groups with income of \$20,000 or more into the financial survey . | | | |

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| 4-H Club or Group Leadership (p. 1 of renewal) | Adult leadership name & contact information is complete for Charter renewal year. | | |
| 4-H Club or Group Meeting Information (p. 1 of renewal) | Club or Group meeting information is complete. | | |
| | All blanks are complete, including social media web addresses. | | |
| | Educator has ensured the website/ social media is following 4-H Name and Emblem and University guidelines appropriately. | | |
| | Bylaws or Operating Guidelines are attached to the document. | | |
| Chartered Club or Group Requirements (p. 2 of renewal) | All club/group requirements are met and educator has followed up with leader regarding those that are not met. | | |
| Club or Group SMART Goals (p. 3 of renewal) | One Program Quality SMART Goal and one Expanding Access SMART Goal has been identified. (See supplemental document for ideas.) | | |
| | Goals from previous years were identified with information on how they were met. | | |
| Calendar (p. 3 of renewal) | A calendar planner is attached, or the form is completed in the 4-H Charter document. | | |
| | The calendar planner provides evidence of education and member business. | | |