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**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.

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| **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 ⅓ 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](https://fyi.extension.wisc.edu/wi4hvolunteers/files/2020/06/Fillable-Audit-Checklist-2020.pdf). 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](https://uwmadison.co1.qualtrics.com/jfe/form/SV_bBj3hsEjGbMeFpj). |  |  |
|  |  |  |  |
| **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](https://fyi.extension.wisc.edu/wi4hvolunteers/clubs-and-groups/charters/annual-financial-report/) 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](https://docs.google.com/document/d/1qlWtXpR1VgGRAsTbep94a52GKGTJ4I4JYnM8c4O-vk8/edit?usp=sharing) 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. |  |  |

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