



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: _____

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 .			

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.		