

## Wisconsin 4-H Charter Review Checklist Tool for Educators

This checklist is a guide for County and State 4-H Youth Development Educators as they review 4-H Charter Applications and Renewal Packets to ensure they are complete. If something is missing, the information must be secured and added to the document prior to uploading on the Wisconsin 4-H Clubs and Groups Collection SharePoint site. This document is for your review only and is not to be uploaded. The tool can be converted into an excel spreadsheet or other format based on individual choice. **Updated October 2014.**

County	
4-H Club or Group Name	
Date	

Completed	Charter Information	Critical Components	What Needs to be Completed
	Articles of Organization (pp. 2-3 for new applications only)	<b>All</b> blanks must be completed including signatures and dates. The Optional box may or may not be completed.	
	4-H Club or Group Leadership (p. 4 for new applications, p. 2 for renewals)	Leadership contacts need to be complete for the Charter renewal year of November 1 through October 31. Some blanks may occur if a 4-H Club or Group does not have specific offices or leadership roles.	
	Planned or Summary of Activities (p. 4-5 for new applications, p. 2-3 for renewals)	<ul style="list-style-type: none"> <li>• Response must be recorded for the 2 check-off questions and 5 open-ended questions.</li> <li>• Review by educator for educational follow-up as needed.</li> </ul>	
	4-H Club or Group Meeting Information (p. 5 for new applications, p. 3 for renewals)	<ul style="list-style-type: none"> <li>• Complete for the 4-H Charter renewal year of November 1 through October 31.</li> <li>• <b>All</b> blanks must be completed except for address of website or social network site if none exists.</li> <li>• If “no” has been indicated in meeting site accessibility, follow up with volunteer.</li> <li>• If group has a website or social network site , follow up by educator to insure the website is following 4-H Name and Emblem and University guidelines appropriately.</li> <li>• For 4-H Clubs, names of leader(s) who attended annual volunteer leader team training need to be listed. Bylaws or Operating Guidelines need to be attached to the document but are NOT uploaded on the Wisconsin 4-H Clubs and Groups Collection SharePoint site.               <ul style="list-style-type: none"> <li>○ Keep in county 4-H Club/Group file.</li> <li>○ If no document exists, follow up is needed for educational response.</li> </ul> </li> <li>• Two signatures and dates required.</li> </ul>	

	<p>Calendar (p. 6 for new applications and p. 4 for renewals)</p>	<ul style="list-style-type: none"> <li>• 4-H Club or Group goals need to be identified.</li> <li>• A Calendar Planner <b>must be attached</b> or the form completed in the 4-H Charter document.</li> <li>• If the Calendar Planner is attached, it must be uploaded in the Wisconsin 4-H Clubs and Groups Collection SharePoint site. If the Calendar Planner is part of a handbook, upload the calendar planner section that provides the required evidence.</li> <li>• The Calendar Planner needs to document evidence of education and member business.</li> </ul>	
	<p>Annual Financial Report (p.5-6 for renewals. Applications should complete what is possible at the time of the application)</p>	<ul style="list-style-type: none"> <li>• <b>ALL</b> blanks must be completed.</li> <li>• A copy of the bank statement ending June 30 for each account held must be attached and kept with 4-H Youth Development Educator in 4-H Club or Group file.</li> <li>• Beginning balances (July 1) and reconciled ending balances (June 30) for all accounts must be completed and totaled.</li> <li>• All funds received and disbursed must be identified in the correct category and totaled.</li> <li>• The difference in the total reconciled funds in the financial accounts must match the difference in total funds received and disbursed.</li> <li>• There needs to be numbers in every box on page 5. If there is not an amount – then enter zero (0).</li> <li>• Fund Raising, Member Dues and Donations need to be <b>at least one-third</b> of the funds received.</li> <li>• All 4-H accounts need to be identified and the names listed of those with authorization for those accounts.</li> <li>• All financial accounts must be audited. Include auditor’s signature and the date of review.</li> <li>• The audit should be conducted by someone not related to those who can sign checks. If the name on the auditor line is the same as someone that can sign the checks – the audit needs to be done by someone else.</li> <li>• Financial report signatures: check that volunteer and treasurer has signed and dated page 6 of report.</li> <li>• If a 4-H Club or Group does not have either a checking or savings account, state this on report. Follow up is requested to ensure proper money handling.</li> </ul>	

Additional Notes: