



Wisconsin 4-H Clubs and Groups Data Collection

Thank you for your work in making sure clubs and groups are filing the necessary paperwork to maintain our state GEN. This work is important and your guidance to clubs/groups is appreciated.

Overview of Wisconsin 4-H Clubs and Groups Data:

- The information provided by the SharePoint Data Collection site provides the documentation of accountability for use by the 4-H Youth Development Program Director, Associate 4-H Youth Development Program Director and UW-Extension Administration. It is important and we thank you.
- **4-H Youth Development Educators are responsible** for keeping the Wisconsin 4-H Clubs and Groups Data Collection SharePoint site current for their county. This includes the County/Organization Contact Information, Appendix A and required documents.
- **November 15 Deadline to reenter data and documents for 4-H clubs, chartered groups and affiliates. This data set is used for the annual report to the IRS.**
- New 4-H Clubs and Chartered Groups should be added as soon as the 4-H Club or Group has formed.
- **4-H Youth Development Educators are responsible** for retaining this information for the Current Year (CY) plus 7 years, for a total of 8 years. It is a best practice to keep the charters for historical purposes past this date.
- **It is important to work with support staff, communicate to county Department Heads and inform volunteers that the charter process is an important requirement for all clubs/groups.**

Getting Started:

(Allow yourself some time to do this. It takes time to upload proof the documents, save the documents as pdfs and send them in. The plus is there is important information on the charters that you can use in your work as the educator to help with program development and needs assessment.)

Step 1: Log on to the Wisconsin 4-H Clubs and Groups Data Collection SharePoint site. You will need your net id and password. The link is: <https://workspaces.ces.uwex.edu/sites/4hdata/default.aspx>

- If your county has a firewall, UWCX\ should precede your name
- If you need assistance on SharePoint contact the Cooperative Extension Help Desk at 1-800-760-7610 or via email at helpdesk@ces.uwex.edu. The SharePoint site also has a link to a document called *Getting to Know SharePoint* that may be helpful.
- You will be adding/editing and uploading information in 3 or 4 places. This includes 2 Lists and 1 or 2 Libraries, which are located on the left side of your screen. Lists are data sets and Libraries hold documents.
- When entering data, a number of drop-down menus and blank fields will assist you. All fields are required to be completed. Some have defaults indicated. Make sure you have entered the correct data for that group.



Instructions for Completing

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Step 2: Confirm County/Organization Contact Information: General contact information is located in the County/Organization Contact Information List. For all 4-H chartered clubs and groups this is the 4-H Youth Development Educator. Affiliates will have their own contact information. This would be the person responsible for the organization and tax filing.

- **What may have changed here since last year?** Change of agent/ educator, change of address

Step 3: Update Appendix A List: Each club, group and affiliate will have its own line entry. This was created the first time you entered data. Confirm the information is still accurate from last year.

- Entity Type needs to be selected. Affiliates require an MOU. 4-H groups are either categorized as a Community Club or Association, Group, Committee. This step will be used to create the Name and Emblem Report.
- Confirm that the proper 990 tax form has been filed and the appropriate response is selected.
- **What else might need to be edited?** There is a new organizational leader so the Volunteer's Name who is listed needs to be changed.

Step 4: Upload the 2012 Charters: Chapter Document Library holds the Charter Applications /Renewal Document, Articles of Organization and Worksheet for each club or group.

When you enter the 2012 data you will:

- Leave the Articles of Organization – this document does not change
- **Replace the Charter Document for Renewal**
 - Scan and save documents as PDF to upload onto the site.
 - **When uploading the PDF, make sure to use the naming conventions (County.Club/GroupName.Charter.Year).**
 - **Delete last year's charter document. WHY? (By adding the year, the naming convention changes and will not replace last year's document.)**
 - **What if the club or group uses a separate educational plan/calendar?**
 - Attach and upload with the charter document.
- **Complete and Replace the Worksheet 1: Determining Tax Exempt Non-Foundation Status**

Step 5: Complete the Name and Emblem Report: When all your data has been updated for the year, you need to add a new Name and Emblem Report. The report will submit to the County/Organization Documents library as well as the State 4-H Office.

The County/Organization Document Library holds both the Transfer of Appointment as Agent document as well as the Name and Emblem/Expansion and Review Report. Most counties have not used anything in this library until now.

To Complete the Name and Emblem/Expansion and Review Report

- **From your county folder in the County/Organization Document Library, click the "Documents" tab.**
- **Click down arrow next to "New Documents." And Select "Name and Emblem" Report."**
- **Once the form opens, select your county from the county dropdown box and the totals and names of any affiliates you have identified will fill in automatically. You cannot change these.**



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- Your totals must match. (If your totals are inaccurate, please double check your listings in Appendix A. Numbers are based off of listings in Appendix A).
- There are 2 required check boxes. You must read and agree to these items before you can submit the form.
- You must also enter the name of the educator submitting the form. Be sure to use either the address book or the person with a checkbox to validate the educator's NETID on the form.
- Then click on "Submit " box.

Excess Funds: *This section only pertains to counties with excess funds who need to file the following:

- ✓ Five year plan – Clubs/Groups when completing Worksheet 1 who have excess funds are required to complete a 5 year plan and file it. **Five year plans should be updated annually.**
- ✓ MOU - Counties who have an MOU with a foundation in their county or with an established local 4-H foundation need to file an annual MOU. **Please post the MOU annually.**
- ✓ Counties who have an approved foundation will have the letter posted here. This would only be counties who had existing long term funds in 2012 that were approved through the Long Term Fund Approval Process.
- ✓ Files will be saved as a pdf and click "Add document".



The 4 charts that follow are a reference for the instructions that are on the SharePoint site.

List: County/Organization Contact Information

Information	Notes
County/Organization Contact Information	For 4-H clubs and chartered groups, this is the 4-H Youth Development Educator and UW-Extension Office Address. For affiliates, this would be the lead contact for the affiliate and affiliate official address.

List: Appendix A

Information	Notes
EIN Number	EIN number is assigned by the IRS to the 4-H club/group or affiliate. All 4-H clubs and chartered groups must have an EIN number. If a group has disbanded and then have recently reformed; they need to apply for a new EIN number.
Chapter Name	This is the 4-H club, chartered group/committee, or affiliate official name. This name must match the EIN application from the IRS. To change the name, this is first done locally by a vote of the members, changed in bylaws or operating guidelines and then submitted to the IRS. The IRS will assign a new EIN number and all financial accounts will have to be changed.
Care of Name	Select the appropriate contact person from the drop down menu.
Entity	Indicate whether the group is a 4-H Community Club; 4-H Association, Group, or Committee; or Affiliate. All affiliates require an MOU. Consult the Wisconsin 4-H Name and Emblem Authorization Continuum Chart which outlines authorization of the use of the name and emblem for chartered, affiliate and other use. It includes definition and process for granting authority for the use of the 4-H name and emblem for each group.
Level	All 4-H clubs and chartered groups are considered subordinates. Affiliates are independent. Select choice from drop down menu.
Tax Exemption Choice	If the tax exemption choice is either B4 or C3, check the first box and select the appropriate choice from the drop down menu. All 4-H clubs and chartered groups are B4. Most affiliates would be C3. If the tax exempt choice is something other than the two designated, then check the second box and enter the appropriate tax exempt status in the field provided.
Name of Entity Ensuring Tax Exemption	All Wisconsin 4-H clubs and chartered groups are under the University of Wisconsin-Extension, which is listed as the default. Affiliates should have the name of the organization that is ensuring their tax exempt status. Change the field as necessary.
EIN of Entity Ensuring Tax Exempt Status	This is the General Exemption Number (GEN) of the organization ensuring tax exemption. For Wisconsin 4-H clubs and groups, this number is 37-1625460 at this time. It is the default setting. For affiliates, enter the EIN of the group ensuring their tax exempt status.
Care of Volunteer Name	This is the name of the volunteer that is the chair, president, or the lead organizational volunteer leader.



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County	Select the appropriate county from the drop down menu.
Status	Select New, Renew, or Dissolved from the drop down menu. For affiliates, select Not Applicable.
WI Charitable Org. Reg. And Reporting	<p>WI Charitable Organization Registration Reporting document will provide needed information to determine if a 4-H club or chartered group is required to register and report with the Department of Revenue and report. Additional information is located on the Financial Management Website. Appropriate paper work is kept at the county level.</p> <p>Select appropriate choice from drop down menu: Not required to file; Required to file but not completed; Required to file and completed. For affiliates, select Not Applicable.</p>
Sales Tax Reporting	<p>State Tax Facts provides the initial information for sales tax reporting. Additional information is located on the Financial Management Website. Appropriate paper work is kept at the county level.</p> <p>Select appropriate choice from drop down menu: Not required to file; Required to file but not completed; Required to file and completed. For affiliates, select Not Applicable.</p>
UBIT Report	<p>An exempt organization that has \$1,000 or more of gross income from an unrelated business must file Form 990-T and pay the appropriate tax (UBIT). The obligation to file Form 990-T is in addition to the obligation to file the annual information return, Form 990 series. http://www.irs.gov/charities/article/0,,id=96104,00.html Appropriate paper work is kept at the county level.</p> <p>Select appropriate choice from drop down menu: Not required to file; Required to file but not completed; Required to file and completed. For affiliates, select Not Applicable.</p>
Tax Exempt Non-Foundation Status	<p>This is determined by the Worksheets for Determining Tax Exempt Non-Foundation Status. Worksheets are to be uploaded under Chapter Documents.</p> <p>If the status is either 509 (a) (2) or 107 (b) (1) (A) (vi), check the first box and select the appropriate choice from the drop down menu. If status is something other than the two designated, check the second box and enter the appropriate non-foundation status in the field provided. For affiliates, select Not Applicable.</p>
IRS 990 Filed	Indication of if the IRS Form 990 series reports are filed. Select the appropriate choice from the drop down menu. For affiliate, select Not Applicable.
MOU on File for Affiliates	This information applies only to affiliates. An MOU is required to be on file with the 4-H Youth Development Educator for all affiliates. Check if this is completed.



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<p>Articles of Organization</p> <p>PDF File Name:</p> <p>County.Club/GroupName.ArticlesofOrg Or for authorized state groups: State.GroupName.ArticlesofOrg Example: Adams.HippySkippyClub.ArticlesofOrg</p>	<p>New Charters only:</p> <ul style="list-style-type: none"> • This includes pages 2-3 of the New Charter Application documents. This document is only uploaded ONCE for every 4-H club and chartered group. <p>For 2012 and beyond, this document will be uploaded at the time a 4-H charter is issued. Articles of Organization document must be retained by the county and state for the entire time a 4-H club or group is active and beyond as per the UW-Extension records retention policy.</p>
<p>Worksheets for Determining Tax-Exempt Non-Foundation Status</p> <p>PDF File Name:</p> <p>County.Club/GroupName.Worksheet Or for authorized state groups: State/GroupName.Worksheet Example: Adams.HippySkippyClub.Worksheet</p>	<p>This includes all Worksheets that were completed to determine tax exempt non-foundation status of the 4-H club or chartered group. In most cases this will be Worksheet 1. Worksheets are located on the 4-H Name and Emblem Website in the Employee Box as a word document.</p> <p>http://www.uwex.edu/ces/4h/resources/policies/symbols.cfm</p> <p>Worksheets are required to be uploaded annually. The PDF File name remains as indicated in the column to the left. When uploading the PDF, make sure the name follows last year's naming conventions and make sure the box to "overwrite existing files" is checked. After uploading the PDF file, when prompted by the information box, update the title of the document to include the current year. Use County.Club/GroupName.Worksheet. Year This step will ensure that only the most recent document is in the database.</p> <p>4-H Youth Development Educators must retain the original worksheets at the local level in the individual 4-H club/group file as per the UW-Extension records retention policy.</p>



Library: County/Organization Documents

Information	Notes
<p>Transfer of Appointment as Agent</p> <p>PDF File Name: County.TransferAppointment.Date Example: Adams.TransferAppointment.01.30.2012</p>	<p>The Transfer of Appointment as Agent Document is required only when there is a change of 4-H Youth Development Educator or in the event of a vacancy or leave of absence. When necessary, complete and upload the form.</p> <p>Transfer of Appointment As Agent documents are retained at the county and state level as per the UW-Extension records retention policy.</p>
<p>4-H Name and Emblem Use and Expansion and Review Report</p>	<p>Annual Name and Emblem Report is due and uploaded by November 15.</p> <ul style="list-style-type: none"> When all your data has been updated for the year, you need to add a new Name and Emblem Report. The report will submit to the County/Organization Documents library as well as the State 4-H Office.
<p>Excess Funds</p> <p>PDF File Name: County.club/group.FiveYearPlan.Year</p> <p>Example: Adams.HappyClovers.FiveYearPlan.2012</p> <p>Example: County.4-H group and foundation name.MOU.Year Adams.4-H Leaders Association and Woodlake Community Foundaton. MOU.2012</p>	<p>Excess Funds:</p> <ul style="list-style-type: none"> This section only pertains to those counties with excess funds who need to file the following: <ul style="list-style-type: none"> ✓ Five year plan – Counties when completing Worksheet 1 who have excess funds are required to complete a 5 year plan and file it with the following naming convention. ✓ MOU - Counties who have an MOU with a foundation in their county or with an established local 4-H foundation; need to file an annual MOU.