



# NEW 4-H CLUBS AND GROUPS

## WISCONSIN 4-H CHARTER APPLICATION

4-H Youth Development

March 2014

A 4-H Charter indicates the 4-H Club or Group is organized in accordance with objectives of the 4-H program. It authorizes the club or group to use the 4-H Name and Emblem for educational purposes in accordance with laws and regulations established by Congress and the U.S. Department of Agriculture.

- The purpose of the 4-H Charter is education, communication and accountability.
- A 4-H Charter is given to a new 4-H Club or Group as they are formed and meeting the requirements.
- 4-H Clubs and Groups must renew their charter annually through completion of the 4-H Charter renewal process. All 4-H Clubs must be chartered.
- All 4-H Groups (including committees, boards or other organizations) that hold any financial accounts must be chartered. If a 4-H Group does not hold any financial accounts, it must be formally recognized and accountable to the County 4-H Leaders Organization.

### **DIRECTIONS**

4-H Club and Group Charters are issued at the time a new 4-H club or group is formed. The charter year is **November 1 to October 31**. Charters are renewed annually and will be granted upon **successful** completion of this "Wisconsin 4-H Annual Charter Renewal" packet. **All sections** in this packet must be completed by the 4-H volunteer club or group leadership team for the renewal year of this application. It is expected that youth officers and members be involved in this process. Do not leave any line blank. **Adult and youth volunteer signatures are required on pages 3 and 5**. Thank you for your time in this important process.

To be authorized to use the 4-H name and emblem, *all 4-H Clubs and chartered groups* must complete and **return this packet at the time of formation to the County UW-Extension Office**.

Help is available from the local 4-H Youth Development Staff and 4-H Community Club Central Website:  
<http://www.uwex.edu/ces/4h/clubs/index.cfm> .

### **Why Are 4-H Charters Necessary?**

University of Wisconsin-Extension grants 4-H Charters, which formally recognize a group's affiliation with 4-H and grant that group permission to use the 4-H Name and Emblem. To be a chartered 4-H Club or Group in Wisconsin, the following requirements need to be met and maintained:

- Club name or group name
- Five or more youth from at least three families
- Adult leadership that has been approved through the Youth Protection process
- Educational plan which meets the purposes of the 4-H program
- Youth involvement in leadership and decision-making
- Meet on a continuing basis
- Have written operating guidelines, bylaws or constitution approved by members to govern the club or group
- Open to any youth eligible for 4-H membership, regardless of race, color, creed, religion, sex, national origin, disability, ancestry, sexual orientation, pregnancy, and marital or parental status.

The University of Wisconsin-Extension, Cooperative Extension 4-H Youth Development Program has programmatic and financial accountability for all 4-H Clubs and Groups in Wisconsin. All 4-H Clubs and Groups must follow the [Wisconsin 4-H Youth Development Policies](http://www.uwex.edu/ces/4h/resources/policies/index.cfm) (<http://www.uwex.edu/ces/4h/resources/policies/index.cfm>)

### **WISCONSIN 4-H GREEN GUARANTEE**

4-H Charters ensure that groups using the 4-H name and emblem are meeting the following components of the "Wisconsin 4-H Green Guarantee" and providing opportunities for 4-H members to develop and learn through 4-H.

In Wisconsin, 4-H Clubs and Groups *guarantee* youth members the opportunities to:

- Develop positive relationships with peers and adults;
- Be actively involved in their own learning;
- Contribute as active citizens through community service and leadership;
- Develop skills that will help them succeed;
- Recognize, understand and appreciate others;
- Have fun.



NEW 4-H CLUBS AND GROUPS  
ARTICLES OF ORGANIZATION

These Articles of Organization are entered into by those who have signed below for the purpose of forming a 4-H Club or 4-H Group as an Unincorporated Nonprofit Association under Ch. 184 of the Wisconsin Statutes. These are completed **once** for the lifetime of the 4-H club or group.

**Article 1. Name of the 4-H Club or Group/Committee, which is organized as an association by this document:**

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Check One:  4-H Club     4-H Group

**A. Name of the County in which the 4-H Club or Group is located:**

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**B. County 4-H Youth Development Educator, who, by signing below, agrees to oversee the 4-H Club or Group and act as the 4-H Club or Group's agent:**

|                   |                      |              |
|-------------------|----------------------|--------------|
| <i>Signature:</i> | <i>Printed Name:</i> | <i>Date:</i> |
|-------------------|----------------------|--------------|

**C. Address of the County UW-Extension Office, which will serve as the mailing and business address for the 4-H Club or Group:**

|                        |                     |                  |
|------------------------|---------------------|------------------|
| <i>Street Address:</i> |                     |                  |
| <i>City:</i>           | <i>State:</i><br>WI | <i>Zip Code:</i> |

**Article 2.** The 4-H Club or Group's term of existence shall be perpetual. This means that the 4-H Club will continue to exist until it is dissolved, according to UW-Extension 4-H policies and the 4-H Club's bylaws.

**Article 3.** The purpose of the 4-H Club or Group is to organize and operate exclusively for the nonprofit purposes allowed by Section 501(c)(3) of the Internal Revenue Code. Section 501(c)(3) prohibits the 4-H Club or Group from paying any profits, above reimbursements for the 4-H Club or Group's expenses, to any of its members, directors, or officers. Additionally, Section 501(c)(3) prohibits the 4-H Club or Group from taking sides either in political campaigns or in any effort to pass a specific law. This 4-H Club or Group will primarily operate for educational purposes.

**Article 4.** The 4-H Club or Group agrees to comply with all applicable UW-Extension policies and procedures governing 4-H, and agrees that the County 4-H Youth Development Educator has all necessary and proper authority to oversee the 4-H Club or Group to ensure the 4-H Club or Group's compliance.

**Article 5.** UW-Extension is authorized to include the 4-H club or group in a group tax exemption, and the 4-H Club or Group will supply the County 4-H Youth Development Educator all necessary documentation to ensure the 4-H Club or Group's inclusion in a group tax exemption.

**Article 6.** The 4-H Club or Group's members, directors, or officers will be selected according to the UW-Extension 4-H policies and the 4-H Club or Group's by-laws.

**Article 7.** These articles can be changed according to the policies, rules, and laws that apply at the time the articles are changed.

**Article 8.** Upon dissolution of the 4-H Club or Group, any assets will be permanently dedicated to nonprofit purposes and turned over to another recognized 4-H club, unit, or group with the approval of the 4-H Leaders Association and the county 4-H Youth Development Educator. The recipient of the 4-H Club or Group's assets will only operate for the nonprofit purposes allowed in Section 501(c)(3) of the Internal Revenue Code.

**Article 9. Name, address, and signature of each organizer—the organizers are the 4-H Volunteer Organizational or Group Leader(s) and the 4-H Youth President or Chair:**

|   |  |  |               |             |                  |
|---|--|--|---------------|-------------|------------------|
| <i>Signature of 4-H Volunteer Organizational or Group Leader who is 18 years of age or older:</i> |  | <i>Printed name of 4-H Volunteer Organizational or Group Leader who is 18 years of age or older:</i> |               | <i>Date</i> |                  |
| <i>Street Address:</i>  |  |  |               |             |                  |
| <i>City:</i>  |  |  | <i>State:</i> |             | <i>Zip Code:</i> |

|  |              |  |               |              |                  |
|--|--------------|--|---------------|--------------|------------------|
| <i>Signature of 4-H Youth President or Chair:</i>    |              | <i>If 4-H Youth President or Chair is under 18 years of age, signature of parent or legal guardian:</i>    |               |              |                  |
| <i>Printed name of 4-H Youth President or Chair:</i> | <i>Date:</i> | <i>If 4-H Youth President or Chair is under 18 years of age, printed name of parent or legal guardian:</i> |               | <i>Date:</i> |                  |
| <i>Street Address:</i>                               |              |  |               |              |                  |
| <i>City:</i>   |              |  | <i>State:</i> |              | <i>Zip Code:</i> |

Optional: Complete this box if an additional 4-H volunteer serves in an organizer role.

|   |              |   |               |              |                  |
|---|--------------|---|---------------|--------------|------------------|
| <i>Signature of volunteer organizer:</i>    |              | <i>If organizer is under 18 years of age, printed name of parent or legal guardian:</i> |               |              |                  |
| <i>Printed name of volunteer organizer:</i> | <i>Date:</i> | <i>If organizer is under 18 years of age, printed name of parent or legal guardian:</i> |               | <i>Date:</i> |                  |
| <i>Street address:</i>                      |              |   |               |              |                  |
| <i>City:</i>                                |              |   | <i>State:</i> |              | <i>Zip Code:</i> |

# 4-H CLUB OR GROUP'S LEADERSHIP INFORMATION

Complete for the charter renewal year of November 1 through October 31.

County: \_\_\_\_\_ Today's Date (mm/dd/yy) \_\_\_\_\_

Name of 4-H Club or Group \_\_\_\_\_  4-H Club  4-H Group

Name of Primary 4-H Club/Group Contact: \_\_\_\_\_

E-mail: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Co-Leader(s) / Assistant(s): \_\_\_\_\_

Co-Leader(s) / Assistant(s): \_\_\_\_\_

Co-Leader(s) / Assistant(s): \_\_\_\_\_

Officers: (please complete the leadership roles applicable to the 4-H Club or Group):

President/Chair: \_\_\_\_\_

Vice-President/ Vice-Chair: \_\_\_\_\_

Secretary: \_\_\_\_\_

Treasurer: \_\_\_\_\_

Reporter: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

## PLANNING FOR FIRST YEAR ACTIVITIES

What do you plan to include in your regular meeting routine? (Please check *all* that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Business meeting | <input type="checkbox"/> Educational program               |
| <input type="checkbox"/> Food/snacks      | <input type="checkbox"/> Sharing/get acquainted activities |
| <input type="checkbox"/> Recreation/games | <input type="checkbox"/> Project meetings                  |
| <input type="checkbox"/> Demonstrations   | <input type="checkbox"/> Other: _____                      |

How did you plan to communicate with families in your 4-H Club/Groups? (Please check *all* that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Phone tree               | <input type="checkbox"/> Club or Group meeting announcements   |
| <input type="checkbox"/> E-mail                   | <input type="checkbox"/> Website – Club or County (circle one) |
| <input type="checkbox"/> Club or Group newsletter | <input type="checkbox"/> Social media (such as Facebook)       |
| <input type="checkbox"/> Letters / postcards      | <input type="checkbox"/> Other: _____                          |

How will the 4-H Club or Group help create a welcoming environment for members and families, especially *new* members and families?

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## Planning for the Year's Activities, Continued

How will the 4-H Club or Group involve *youth* in making decisions?

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Please list the planned *community service* projects and possible impact the 4-H Club or Group intends to do this first year.

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## 4-H CLUB MEETING INFORMATION FOR THIS FIRST YEAR

Regular 4-H Club or Group **meeting time**: Day of month: \_\_\_\_\_ Time: \_\_\_\_\_

**Location** where 4-H Club or Group meetings normally will be held: \_\_\_\_\_

Is the meeting site **handicap accessible**?  Yes  No

Does the 4-H Club or Group have at least five or more youth from at least three families?  Yes  No

Does the 4-H Club or Group have a **website**?  Yes  No

If yes, address of Website: \_\_\_\_\_

Does the 4-H Club or Group have a **Facebook or social network site**?  Yes  No

If yes, address of Facebook or other Social network site: \_\_\_\_\_

For 4-H Clubs and Groups, list the names of the one or more leader(s) that attended the **Annual Volunteer Leader Team Training**. This training is **required** for charter renewal. (This is not the Youth Protection Volunteer Orientation Workshop.)

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Wisconsin 4-H Policies state that every 4-H Club or Group must have written operating guidelines or bylaws. **Please attach one copy of the 4-H Club's or Group's written operating guidelines or bylaws** if completed.

Indicate meeting date for distribution to members \_\_\_\_\_

Date bylaws or operating guidelines were developed and approved by members \_\_\_\_\_

Does the 4-H Club or Group **own land or buildings**?  Yes  No If yes, describe:

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Does the 4-H Club or Group **own other property or project equipment** (over \$500)  Yes  No If yes, an inventory needs to be in the club or group's records file and updated annually. The 4-H Youth Development Educator may want a copy of this inventory.

*By signing this, we agree to make all reasonable efforts to assure participation in our 4-H Club or Group is open year-round to all interested youth (of eligible 4-H grade) and adults regardless of race, color, creed, religion, sex, national origin, disability, ancestry, age, sexual orientation, pregnancy, marital or parental status.*

\_\_\_\_\_  
Print 4-H Adult Volunteer Leader Name

\_\_\_\_\_  
4-H Adult Volunteer Leader Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print 4-H Youth Leader Name  
(Club President or Group Youth Leader)

\_\_\_\_\_  
4-H Youth Leader Signature

\_\_\_\_\_  
Date

# 4-H CLUB OR GROUP ANNUAL CALENDAR PLANNER

**4-H Club or Group Goals for the Year** (e.g. increase the educational experiences for members, develop newsletter with 4-H members, review and evaluate community service project to meet local community needs, increase number of youth leaders, etc.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Please provide** meeting dates, planned business topics and educational programming for each meeting. The three parts of *effective* 4-H meetings are business, education and recreation.

**Check One:**

- The 4-H Club or Group Annual Calendar is attached to this document (do not include meeting agendas)
- The 4-H Club or Group Annual Calendar is completed below (add additional pages if needed)

| Month     | Meeting Logistics                                  | Meeting, Event, Activity  | Committee Person(s) Responsible |
|-----------|--|---|---------------------------------|
| SAMPLE    | September 12, 7:00 p.m.<br>Clover Center Town Hall | <i>Business Items: Election of Officers,<br/>Community Service idea for fall, form<br/>Holiday Party Committee<br/>Education/Program: Guest speaker, Clover<br/>Center Police Officer<br/>Recreation/Refreshments: Smith Family</i> | Mrs. Smith<br>Jane Heart        |
| November  |  |   |                                 |
| December  |  |   |                                 |
| January   |  |   |                                 |
| February  |  |   |                                 |
| March     |  |   |                                 |
| April     |  |   |                                 |
| May       |  |   |                                 |
| June      |  |   |                                 |
| July      |  |   |                                 |
| August    |  |   |                                 |
| September |  |   |                                 |
| October   |  |   |                                 |

# 4-H CLUB OR GROUP ANNUAL FINANCIAL REPORT

Name of 4-H Club/Group: \_\_\_\_\_ Today's Date (mm/dd/yy) \_\_\_\_\_

\*EIN (Employee Identification Number, also known as the Federal Tax ID Number) \_\_\_\_\_

Wisconsin or Tribal Sales Tax Exempt Number (if the 4-H Club or Group has one) \_\_\_\_\_

**4-H money is public money.** The safety of all 4-H funds, volunteers and members are of the highest priority. UW-Extension, Cooperative Extension 4-H Youth Development is accountable for the educational programs and finances of all 4-H Clubs and Groups.

- The 4-H fiscal year is July 1 through June 30.
- All 4-H Clubs and Groups must comply with [Wisconsin 4-H Youth Development Financial Policies](#).
- All 4-H Clubs and chartered Groups are required to have an Employee Identification Number (EIN) number and submit a financial record and audit report to the County UW-Extension Office once each year. All 4-H Clubs must file an IRS Form 990 annually in cooperation with the 4-H Youth Development Educator
- Federal regulations governing the use of the 4-H Name and Emblem require annual financial reporting/accountability of all organized 4-H Clubs and Groups. Failure to annually submit the financial report could result in loss of approval to use the 4-H Name and Emblem and the 4-H Charter
- Funds raised in the name of 4-H must be publicly accountable and must be used for 4-H educational purposes.
- It is recommended that 4-H Clubs and Groups use a cash accounting method
- Bank accounts need to have two signatures, one adult volunteer with oversight for the club or group's finances and the youth treasurer. These two persons should not be related.

## Information that will be required annually on the Annual Financial Report includes:

- EIN (Employer Identification Number), also known as Federal Tax Identification Number
- Wisconsin or Tribal Sales Tax Exempt Number, if your 4-H Club or Group chooses to get one
- A bank statement for all accounts held by the 4-H Club or Group
- A list of all funds received and funds dispersed and reported in the appropriate category.
- Identification of 4-H Club or Group accounts
- Documentation of the annual audit of the 4-H Club or Group accounts

## \*Employee Identification Numbers (EIN):

- The IRS requires UW-Extension to annually certify the complete list of subsidiary groups who are eligible to use the 4-H general tax exemption number (GEN). To accomplish this, each 4-H Club or chartered Group must submit an Annual Charter Renewal Packet with complete financial accounting to the 4-H Youth Development Educator working with the 4-H Club or Group. In turn, the 4-H Youth Development Educator is responsible to keep the official list of Wisconsin 4-H clubs and Groups up to date.
- The EIN number is needed prior to opening a 4-H Club or Group checking or savings account.
- If your club does *not* have an EIN number yet, a form is available at: <http://www.irs.gov/pub/irs-pdf/fss4.pdf>. A sample form is located at: [Sample SS4 Form](#). When completed, mail to: IRS, Attn: EIN Operation, Philadelphia, PA 19255-0023, or FAX to 1-215-516-3990. It may take about two weeks. Another way to obtain an EIN is by calling 1-800-829-4933. You will be asked for information and will receive your EIN when the phone conversation is completed. The IRS will send a confirmation of your number by mail. It is not recommended to use the IRS Internet online tool for obtaining an EIN because it requires giving a Social Security Number. Instead, complete the SS-4 then print and fax or mail it, or phone in the information.
- Contact your 4-H Youth Development Educator as you complete the SS4 form.



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## Accounts Information

This is a **sample** of what is expected for each 4-H Charter Renewal. **You may complete this if these are in place at this time or use this as a worksheet as you put money handling practices in place with the 4-H Club or Group.**

**Checking Account Information**  
 Account Name (exactly as it appears on the bank statement) \_\_\_\_\_

Bank Name and Location \_\_\_\_\_ Account Number \_\_\_\_\_

### Savings Account Information

Account Name (as it appears on the bank statement) \_\_\_\_\_

Bank Name and Location \_\_\_\_\_ Account Number \_\_\_\_\_

**Account Authorization:** Names of people authorized on any accounts. It is strongly recommended that each account have two or three unrelated people authorized on all accounts. One youth and one adult are recommended.

**Handling 4-H Money:** List if there are **any other youth or adults** that coordinate a fundraiser or program on behalf of the club or group that would be handling money who are not on the account authorization above:

## Annual Accounting Form (completed after each fiscal year)

|   | Beginning Balance (July 1) | Reconciled Ending Balance (June 30) |
|---|----------------------------|-------------------------------------|
| Checking Account  | \$                         | \$                                  |
| Savings Account (combine all savings, money market, CD's, etc.) | \$                         | \$                                  |
| <b>Total Funds</b>  | <b>\$</b>                  | <b>\$</b>                           |

*4-H Clubs must use the categories as listed below as identified. Suggested additional categories for **Funds Disbursed** include: Dues Paid to County, Educational Supplies, Community Service Expenses, Recreation, etc.*

| Funds Received                                      |           | Funds Disbursed              |           |
|---|-----------|------------------------------|-----------|
| Fund Raising (do not subtract expenses)             | \$        | Fund Raising Expenses        | \$        |
| Member Dues   | \$        | <i>(list category)</i>       | \$        |
| Donations <sup>1</sup>                              | \$        | <i>(list category)</i>       | \$        |
| Investment Income <sup>2</sup>                      | \$        | <i>(list category)</i>       | \$        |
| Income from Youth Development Services <sup>3</sup> | \$        | <i>(list category)</i>       | \$        |
| Other/ Pass Through Funds <sup>4</sup>              | \$        | Other/ Pass Through Funds    | \$        |
| <b>Total Funds Received</b>                         | <b>\$</b> | <b>Total Funds Disbursed</b> | <b>\$</b> |

<sup>1</sup> Occasionally, the 4-H Youth Development Educator may need to access a record of individual donations during the last fiscal year. In that instance, the 4-H Youth Development Educator will contact you.

<sup>2</sup> Investment income includes interest earned in a bank account or trust fund, or income from land or other property.

<sup>3</sup> Income from providing youth development services only includes fees charged directly to participants for the ability to participate in programs, such as 4-H camps. However, it does not include membership dues.

<sup>4</sup> Other/Pass Through Fund includes fees collected for educational programs carried out by other groups. This money is collected from the member/family and then paid directly to the other group/organization.