



4-H Club Chartering staff roles and responsibilities

Chartering 4-H Clubs is a collaborative process involving local, regional, and state staff. This document outlines the roles of involved parties, relevant documents, communication expectations, and key dates to ensure chartering compliance and support club health.

- **Local 4-H Program** leads club support, local review, and communication.
 - 4-H Extension Educator (4-HEE)
 - County Support Staff (CSS)
- **Regional Support Team**
 - 4-H Program Operations Specialist (PO) - leads chartering planning, document revision, and staff training and support.
 - 4-H Program Regional Support Staff (RSS) - verifies club officer enrollment, handles 990-N filing, and generates club charter approval letter and certificate.
 - Volunteer Systems Regional Support Staff (VSS) - verifies adult volunteer status.
 - Volunteer Systems Extension Educator (VSEE) - works with 4-H EE to develop plans and ensure club volunteers are approved.
- **State-level Coordination**
 - CCC = Club Charter Coordinator, Marcia Woeste, woest001@umn.edu - Charter process management and approval.
 - Judy Leibfried - 990N filing support.
 - Amy DeGroot - 4-H Online club status management.

**Refer to the [Team Roster](#) to determine your VSEE and PO specialists.*

Document Locations

- [Internal chartering documents](#)
- [Public chartering documents](#)
 - Club Charter (with funds) - [print](#) or [fillable PDF](#)

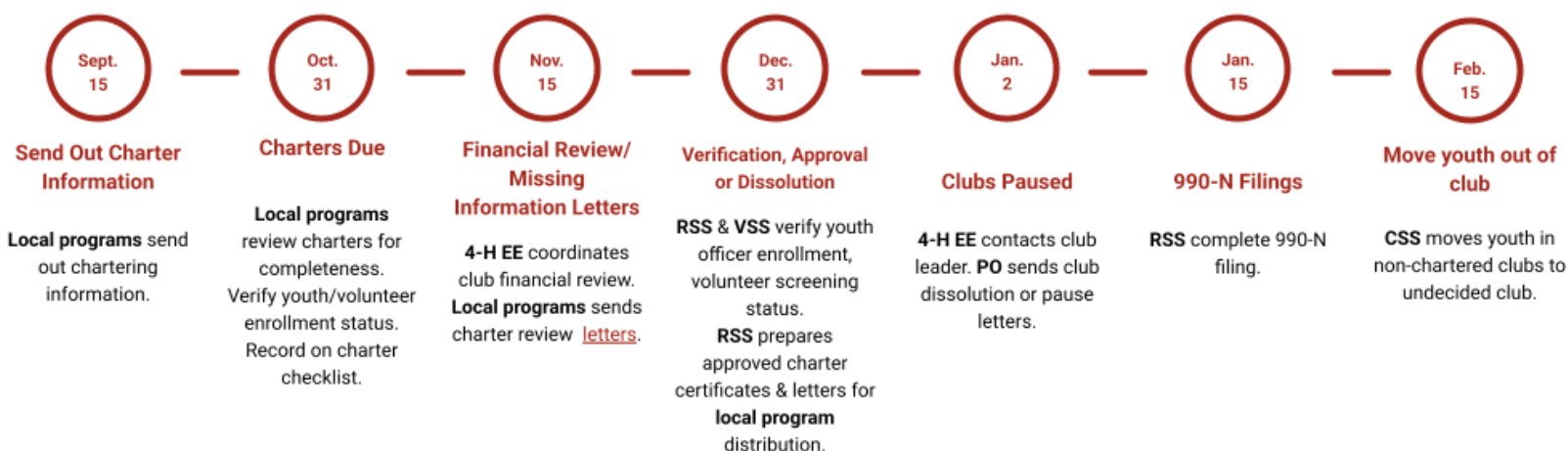
- Club Charter (without funds) - [print](#) or [fillable PDF](#)
- Club Charter for first year clubs - [print only](#)

Communication

- Record any communication with club leaders/members in the [club charter checklist](#).
- Cc: all club leaders on emails to with officers, volunteers about re-enrolling, volunteer screening, missing financials, etc. so they know their club's status.

4-H Club Charter Timeline and Responsibilities

Charter information available August 31
Deadlines - all steps can be completed earlier



Timeline and Responsibilities

1. Preparation and Distribution

September 15 (or earlier):

Local 4-H Program

- Determine local management and support strategy.
- Distribute charters to clubs. Charters are posted on the [Leading a 4-H Club website](#).
 - Pre-fill information (e.g., club name, beginning balance of the checking and savings accounts in the "Previous Year Financial Summary" section. This number should match the previous year ending balance. (optional)
 - Remind clubs that all volunteer leaders and youth officers must be enrolled and financial information needs to be submitted with their charter.

VSEE

- Work with 4-HEE to develop a plan to activate club volunteers so each club clubs complete the charter process (ongoing)

2. Charter Submission, Review, and Follow-up

October 31 (or upon submission):

Local 4-H Program

- Review submitted charters for completeness.
 - Prepare "[Missing information](#)" letters for clubs that did not submit complete charter applications. Send letter on or before November 15 and CC: Marcia Woeste, CCC. Missing or incomplete information may be:
 - club information and approval date
 - youth leadership (officers and/or strategy)
 - club goals
 - bank account signature authority
 - calendar
 - financial information
 - Verify all youth officers are enrolled. If a youth officer was a 4-H member last year and is not enrolled, [staff may re-enroll](#) them. If a youth officer was not a 4-H member last year, the youth officer must enroll.
 - Verify all adult volunteers are approved in 4-H Online.
 - **4-H EE** works with **VSEE** to develop a plan to activate club volunteers so clubs meet Safety of Minors supervision requirements. Contact volunteers directly with instructions to complete the necessary steps.
- Record completed charter information on the [club charter checklist](#). Look for the "2025-2026" tab at the bottom of the sheet.
 - Notify RSS, VSS, and CCC when information has been entered into the tracking sheet.
 - RSS:
 - Central Region: Dawn Marinaro
 - Northeast Region: Amy DeGroot
 - Northwest Region: Lisa Anderson/Kaitlin Barbosa
 - Southeast Region: Amy DeGroot
 - Southwest Region: Jazlyn Meyer
 - VSS:
 - Central Region: Cheryl Stephenson
 - Northeast Region: Elaine Hardy
 - Northwest Region: Joan Berg
 - Southeast Region: Janet Beyer
 - Southwest Region: Carlee Kling
 - Do not modify data after entry without consultation with CCC, VSS, and/or RSS.

October 31: Charter DEADLINE

Local 4-H Program

- Identify if any clubs did not submit a charter application.
 - Prepare and send "[No Charter Application Submitted](#)" letter for any clubs that did not submit a charter.

November 15 (or earlier):

4-H Extension Educator

- Coordinate the 4-H Club Financial Review process using the [4-H Club Financial Review process instructions](#). Reviewers cannot be related to club treasurer or adult advisor.
 - Options to conduct financial review include but are not limited to:
 - A. Club youth treasurer and adult advisors from another club.
 - B. A financial team consisting of the Federation youth treasurer and adult volunteer advisor(s).
 - C. Work with an outside firm.
 - D. Review completed by CSS or another individual that does not participate in the 4-H club.
 - E. 4-HEEs are allowed (not required) to conduct the review. If the 4-HEE is not part of the review, they must review the financial review findings prior to being shared with the club.
 - Contact the club leader to discuss how the financial review discrepancies are being resolved, and assess whether the club requires additional support from the Local 4-H Program or the PO.
 - **NEW:** Upload the completed club financial review form. Link found in the [club charter checklist](#).

Local 4-H Program

- Prepare and send [letters](#) to clubs, members, and leaders to inform them of missing information, the safety of minors violations and/or lack of active enrollment.

3. State-level Verification and Approval

December 31 (or earlier):

RSS

- Verify youth officer enrollment on club charter tracking spreadsheet.
 - Contact 4-HEE about any youth officers who are not enrolled. Staff may also re-enroll youth because they have shown intent to be in 4-H by being elected an officer.
- After charter approval by CCC, prepare club charter certificates and approval letters and place in shared drive for the Local 4-H Program to notify clubs of their renewal status.
 - Contact 4-HEE that club(s) have been approved and club charter certificates and approval letters are ready for them to download and distribute.
 - NOTE: This does not need to occur at the same time as the 990N filing.

- Amy DeGroot will cross reference chartered clubs with clubs available/listed in 4-H Online, work with counties to remove clubs that are no longer chartered or active. Remove any clubs that you terminate/disband when you file 990N's.

VSS

- Verify adult leadership approval on club charter tracking spreadsheet.
 - Verify club leaders have the correct Club Volunteer type selected in 4-H Online.
 - Contact 4-HEE about volunteers who are not enrolled/not screened.

Local 4-H Program

- Download club charter certificates and approval letters, signs, and distribute to clubs.
- Contact PO to have a conversation about any clubs that may need to be paused.
- Sends out pause letters after conversation with PO.

PO

- Oversees club dissolution process.
 - Sends letters of dissolution to clubs when the club decides to dissolve.
 - Sends letters to club members inviting their participation in other clubs if the club is dissolving.
- Coordinates process when clubs request a pause.
 - Sends letter acknowledging requested pause
 - Records date in club charter checklist.
- Facilitates clubs being paused because charter not complete/approved.
 - PO has a conversation with 4-HEE about communication that has taken place with club leadership on reasons the club is being put on pause.
 - EE sends a letter after conversation regarding pause.

January 2:

4-HEE

- Follow up with the club leader if the club charter requirements have not been met. Contact, ideally via phone or face-to-face, to communicate they will be paused.
- Communicate status with PO.
- Send a pause letter to the club leader and to members encouraging them to select another club by February 15.

January 15:

RSS

- Complete 990-N filings according to information received from Judy Leibfried.
 - If the charter is incomplete, but financial information has been collected and reviewed, file the 990-N by the deadline.
 - If a club is in the process of dissolving, but has not closed their accounts and turned the funds into the Extension Office, file the 990-N as normal for the current tax year.

- If the club has proof that all accounts are closed and have turned the funds into the Extension Office, file the 990-N as dissolved for the fiscal year in which the account was closed.

February 15 (or earlier):

CSS

- Move any remaining members of non-chartered clubs to the undecided club.

Additional 4-H Program Operations Specialist roles

- Coordinates and completes club charter planning and document revision and posts forms on the public "[leading a club](#)" site by August 31.
- Updates and posts staff supporting documents intranet "[club chartering](#)" site.
- Coordinate with RSS Judy Leibfried to update club charter tracking spreadsheet for all counties for the club chartering year, by September 15. Contact Judy at leibfoo7@umn.edu with access questions.
- Host a staff webinar reviewing the chartering process.
- Work with regional and county staff to ensure everyone understands their responsibilities and all timelines are met.
- Work with clubs that are paused or disbanding.
- Work with 4-HEE to develop a plan for clubs that indicate they have financial issues.
- If chartering documents indicate that a club is struggling with planning, leadership or youth involvement, ensure the 4-HEE and/or appropriate regional Extension Educators/Specialists are notified to address the issue.
- Send communication to 4-H staff reminding them of the process for sending letters for clubs not meeting chartering requirements by October 31.

