Club Chartering Training Instructions

All clubs must charter at the end of each 4-H year, and information sent to the Extension office by November 1st. This document will help you access the online club chartering training which will provide you with step by step directions on how to complete the annual club charter.

Step 1:  [www.extension.umn.edu](http://www.extension.umn.edu)  Please access website

Step 2:  Select Youth on the yellow bar

Step 3:  Select Minnesota 4-H on the drop down

Step 4:  On the left hand side select Clubs

Step 5:  “Select Go to club management”

Step 6:  Select the Chartering Tab

Step 7:  Run a copy of Forms A, B, C and D and watch the Chartering Video using the worksheets. Please complete the evaluation survey found on the bottom of the web page.

Step 8:  Form A – Pages 1-3- Charter Renewal Form

Page 1:  Make sure page is filled in completely and all steps are checked off. Remember to propose the charter at a club meeting, date and record in secretary minutes (under Charter Approved)

Page 2:  All youth listed on this page must be enrolled, and all adults listed must be MN 4-H volunteers who have completed the screening process.

Page 3:  Must include for insurance purposes. If meetings change please contact the program coordinator.

Step 9:  Form B – Financial Summary

The club treasurer should have this form in their excel checkbook ledger – (Form B is located in the tabs on the bottom of the excel checkbook ledger). If the club treasurer used the excel checkbook ledger the checking portion of Form B should be complete. The savings portion will need to be inputted manually. You will need to get the completed form from the club treasurer.

If the club treasurer did not use the excel checkbook ledger, then the starting balance, all income, expenses and ending balances in both savings and checking will need to be entered manually.

Step 10:  Form C – Proposed Budget

The club treasurer should have this form in their excel checkbook ledger (Form C is located in the tabs on the bottom of their ledger). If the club treasurer used this document for record keeping the top box on Form C should be complete. The treasurer would type in all of the proposed income and expenses and this form would calculate automatically. If the treasurer did not use the excel checkbook ledger this process will have to be done manually.
### Step 11: Form D – Financial Review

**NOTE ON WHO CAN COMPLETE THE FINANCIAL REVIEW**

Anyone listed on the signature card the previous year cannot complete the review. You can find this information on the previous year club charter.

Anyone reviewing the books cannot be related to anyone on the previous year signature card. Related refers to mother/step-mother, father/step-father, guardian, son, daughter, brother, sister, spouse, aunt, uncle, cousin, grandma, grandpa, or living in the same household.

People listed on the NEW signature card, that were not on the previous card, can complete the review.

### Excel Checkbook Ledger

The excel checkbook ledger is referenced several times throughout the training.

It can be located at: [www.extension.umn.edu](http://www.extension.umn.edu), youth, leading a club, officer books.

This document is not for club chartering, but a resource for your club record keeping that would make the chartering process easier when used by the club treasurer and adult advisor.

Form B and C are located in the tabs at the bottom of this form.

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**Final Reminder:** Make sure all of the documents are filled in completely, all required signers have signed, and documents turned into the Extension office no later than November 1st.

Once your club charter has been approved by Minnesota 4-H and taxes have been filed, the club will receive a Charter Renewal notification letter.

**Note:**
If the club treasurer has not taken the treasurer training in the past, please make sure it is taken for the new fiscal year. Forms B and C are found on the tabs on the bottom of the excel checkbook ledger and will calculate automatically. This will make the chartering process much easier.

If you should have any questions feel free to contact the Extension Office at XXX-XXX-XXXX