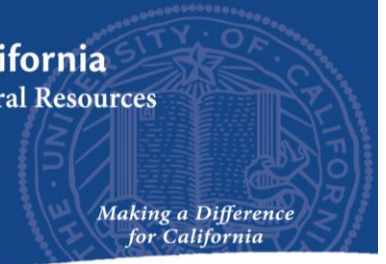


Club Required Documents Guide

UC 4-H – Santa Barbara County

5.2022

University of California
Agriculture and Natural Resources



May 31, 2022

Hello 4-H Club Community Leaders,

As we come to a close of the 2021-22 year, there are a few housekeeping items the 4-H clubs need to take care of. The packet you are receiving is an End-of-Year Packet, which will help you navigate required club forms and upcoming due dates for the end of the year. Please provide copies to those that might need them. I also recommend that you familiarize yourself with its contents, so documents are submitted on their due date.

Electronic versions of the forms are available on the SBC 4-H website at the following link:

http://www.sb4h.org/Club_Packet/Community_Leader/

You can submit documents by **EMAIL ONLY** to Ana Torres @ amltorres@ucanr.edu

- ❖ **2022-2023 Enrollment Fees:** The CA 4-H program has released enrollment fees for the 2022-2023 program year. Please note that both enrollment fees have NOT increased for this next program year.

Adult Insurance \$28.00, Youth Insurance \$62.00 and County Share fee \$6.00

- ❖ **Due July 1st** (so we can let the SBC Fair know and get our website updated)
 - List of Members NOT in Good Standing (see [steps to success](#) document for guidance)
 - 4-H Club Information for the NEW program year 2022-2023
 - 4-H Club Project List (we will need this to update 4-H Online projects, without it your club projects will not show)
- ❖ **Must be submitted and approved before club starts assessing enrollment fees**
 - Annual Request to Assess Club 4-H Program Fees (submit **only** if your club assess extra fees)
- ❖ **Due August 1st**
 - Record Book Gold Seal List & Evaluators List
 - 4-H Outreach Methods Documentation Form with supporting documentation
 - End of the year financials
 - Copy of ALL club minutes from 2021-2022

I appreciate your attention to your club's end-of-the-year requirements and your adherence to the due dates. Please let me know if you have any questions. Thank you for serving as a 4-H Club Community Leader this year.

Sincerely,

Andrea Hollister

4-H Community Education Specialist II

aeborunda@ucanr.edu

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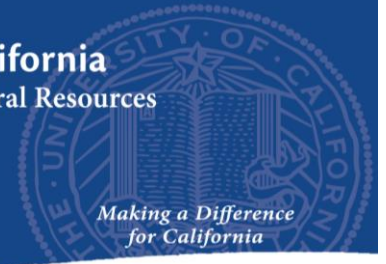


Inside this packet you will find all the documentation you will need to turn in throughout the year in order to remain a chartered club. This packet explains the dates all the paperwork is due, and what each document is.

Submit all Paperwork to:

Andrea: aeborunda@ucanr.edu

Documents Required	Due Date
Annual Club Planner/ Club Meeting Planner	October 1st
Fundraising Approval Form 8.7	October 1st
2022-23 Club Budget Form 8.4	October 1st
1st Installment of Enrollment Fees Due	December 15th
2nd Final Installment of Enrollment Fees Due	June 15th
List of Members Not in Good Standing	July 1st
4-H Club Information/Projects (for the upcoming year)	July 1st
Facility Use Agreement for Meeting Facility	July 1st
Annual Request to Access Club 4-H Program Fees <i>only submit document if you plan to have extra club fees</i>	July 1st
Outreach Methods Decoumentation Form and supporting documents	August 1st
Program Planning Guide 2021-2022	August 1st
County Evaluation Record Book Information	August 1st
Annual Inventory Reporting Form 6.2	August 1st
Annual Financial Reporting Form 6.3	August 1st
Year-End Club Peer Review Report & Checklist Form 8.5 & 8.6	August 1st
2021-22 Club Approved Budget - w/ "Actual to Date"	August 1st
County and Club Officer Record Book Evaluations	TBD



Documents Explained

- **Annual Community Club Leader Agreement**
 - This agreement is to be signed annually. It spells out your responsibilities as a Community Club leader and the resource available for CCL's to utilize. [Click HERE to view document](#)
 - *For returning CCL's*: here is an area on page three that asks you to list all of the trainings you went to, the number of trainings you put on, and the number of general meetings held last year. New CCL's can disregard this section.

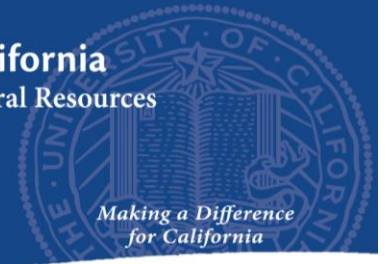
- **Annual Club Planner/ Club Meeting Planner**
 - Appendix V and VI from the Office Manual. During your first Officer's Meeting, use these document to plan out what events your club will be putting on/ participating in and confirm what general club meetings will take place throughout the year.

- **Fundraising Approval Form 8.7**
 - Every fundraiser your club has throughout the year **must be approved** by the County Director, with this form, before it happens.
 - Everything from small bake sales to large dinner fundraisers must have a Fundraising Approval Form submitted at the beginning of the year.
 - If a fundraiser is created mid-year that was not approved at the beginning of the year, you can file an additional Fundraising Approval Form to the office. Be sure you submit the form as soon as possible.

- **Club Budget 8.4**
 - At the beginning of the year when you are planning your estimated incomes and expenses for the year, you will list all of this information on the Club Budget form.
 - Your club's "Opening Balance" on this form is your clubs "Ending Balance" from last year's budget.

- **Outreach Methods Documentation Form with support documents**
 - Throughout the year, you are required to do various forms of outreach to your communities. This document is to record all of your outreach efforts.
 - To be in good standing, your club must complete at least 3 out of the first 4 requirements in this form and provide the documents used.
 - Be sure to be recording your efforts as you go with this form!

- **List of Members Not in Good Standing**
 - Use this form to record any members that have not met the [Steps to Success](#) Member in Good Standing requirements. See document that explains the process [HERE](#)



- **Program Planning Guide**
 - Set goals at the beginning of the year. The first 14 items are already checked for you because they are required for maintaining your club charter. Check the other items in the guide that you are planning to accomplish throughout the year.
 - You will be marking the right hand side “Completed” check list throughout the year as your club meets the accomplishments.

- **4-H Club Information**
 - This form provides information about your club for the upcoming year.
 - If information changes as you begin to plan the new year you can send an updated form to the office at any time.

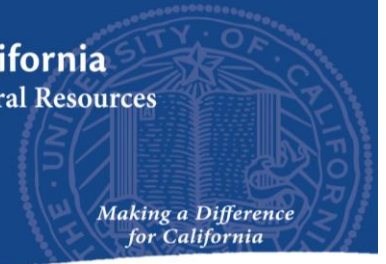
- **Annual Request to Access Club 4-H Program Fees (optional for the upcoming year)**
 - To require an additional club enrollment fee, your club must submit a request form to the 4-H Office.
 - You will need to clearly document why fees would be preferred to the educational experience of group fundraising.
 - A request for establishing program fees must be submitted and approved annually prior to charging fees.

- **Record Books**
 - 4-H members are required to turn in an "APR" form to their 4-H leaders. The APR form is not an entire Record Book, it is simply a summary of what they did in their project.
 - 4-H does not require Record Books from any youth as this is optional. The club can set deadlines on when the APR document is due. http://4h.ucanr.edu/Resources/Member_Resources/RecordBook/

- **Officer Books:** We are still asking for clubs to complete Secretary & Treasurer Books. We realize most of your clubs have not had much activity. Please have those books filled out as best as possible. If no meetings were held please make notes of that in the Secretary's Book. Treasurer books should still be kept up to date even if not much bank activity has happened.

- **Record/Officer Books Evaluation and Deadlines:**
 - Please make sure Secretary and Treasurer books are complete and ready to go by July 31st. We will keep you posted with further communication via email.

- **Financial Reporting:** Please keep an eye out for an email in July with instructions as reporting will be due in August.



- **Facility Use Agreement**
 - You will make facility arrangements to secure the facility where meeting will be held. More directions can be found [HERE](#)
 - Only the UCCE County Director is authorized to sign agreements. Please email to 4-H staff asap in order for paperwork to be processed.

- **Annual Inventory Reporting Form 6.2**
 - At the end of the year, you will list all remaining inventory that your club owns and its value in this form.
 - More information can be found in the Treasurer’s Manual.

- **Annual Financial Reporting Form 6.3**
 - At the end of the year, your Club Treasurer will use this form to record all income and expenses incurred over the program year.
 - This form should reflect the clubs monthly bank statements.
 - More information can be found in the Treasurer’s Manual.
 - Be sure that your Club Treasurer is actively and accurately tracking all income and expenses throughout the year.

- **Year-End Club Peer Review Report Form 8.5**
 - To make sure that your Club Treasurer’s financial documentation records are accurate, two adults and two members (who are not the treasurer, relatives of the treasurer, or anyone who has authority to sign a club check) will review the Treasurer’s book and fill out this form.
 - A thorough explanation of how to conduct the peer-review is on this document.

- **Year-End Club Peer review Checklist Form 8.6**
 - This form goes along with form 8.5 and is also used in the peer-review process.
 - Be sure to document all findings and sign the form.