



Michigan 4-H Club Leadership Transition Checklist

In the event that the volunteer who serves as the primary administrative leader for a 4-H club needs to step down from that role and a different volunteer will assume that role, this form and checklist should be completed by the leaders involved and the local 4-H Program Coordinator.

As a reminder, every chartered 4-H entity must have at least 2 active gold level volunteers connected to it to remain active. If the club possesses a bank account, there must be 2 unrelated adult signatories on the account.

County: _____ Club Name: _____

Current Administrative Leader: _____

Phone Number: _____ Email: _____

I agree that I am stepping down from my role as the club administrator and the person named below will be taking responsibility for the club.

- I will remain an active volunteer, but not in the administrative leader role
- I am planning to resign from my role as an MSU Extension volunteer

Signature: _____

Proposed Administrative Leader: _____

Phone Number: _____ Email: _____

I agree that I am assuming responsibility for the role as the club administrative leader.

Signature: _____

Effective Date: _____

Confirm who the 2nd gold level volunteer for the club will be: _____

Phone Number: _____ Email: _____

To contact an expert in your area, visit extension.msu.edu/experts or call 888-MSUE4MI (888-678-3464)

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This section to be completed by 4-H Program Coordinator

- Confirm proposed volunteers are screened active gold volunteers in Volunteer Central
- Staff person provides expectations to new administrative leader(s) for communication and reporting between club and 4-H office (i.e. annual financial, monthly bank statements, reenrollment processes, county awards, civil rights compliance, risk management, etc.)
- Provide copies/electronic file/link of 4-H Financial Manuals (volunteer and treasurer) to new administrative volunteers. Document in Volunteer Central that these copies were provided.
- Collect and review AFSR (September 1-current date) from outgoing administrative leader. Both volunteers and 4-H staff person review and confirm accurate balance at time of transition.
- Club inventory transferred to new administrative leader (ex. flags, equipment, resources, decorations, charter documents/EIN letter, etc.)
- Confirm the bank signatories changed to add new administrative leader. Resigned leader removed if resigning as a volunteer. At least 2 active gold volunteers are on the account as signatories. Bank may require club minutes documenting who has been approved to be added to the account. Bank may also require a copy of MSU determination letter.
- Update County Financial Spreadsheet with new "Care of" point of contact for club (only 1 name accepted). If transition between September-October, update on County Financial Spreadsheet. If outside this time (November-August), email 4-H Financial inbox with updated information.
- 4-H Online
 - o New administrative leader profile add/change volunteer role; enroll and approve
 - o Club Profile—new administrative leader added, provide permissions to pull club roster reports. Be sure to provide guide:
https://www.canr.msu.edu/od/planning_evaluation_and_reporting/4-h-online-support
- County 4-H Club directory updated with new administrative volunteer contact information
- Update county email distribution lists
- Club member families notified of leadership change, contact information for new leader provided.
- Thank outgoing volunteer for service—include in club transition email and a thank you note to leader.
- Share 4-H Club Development website with lot of resources for leaders.
<https://www.canr.msu.edu/4hclub/index>
- Upload this document in 4-H Online under charter documents in "Program Plan"

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