

# 4-H Club or Group Leadership Change Checklist

Club Name or Group: \_\_\_\_\_

Name of Volunteer Club or Group Leader stepping down: \_\_\_\_\_

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

Name of Volunteer assuming Club or Group leadership: \_\_\_\_\_

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

Name of Bank used by 4-H Club or Group: Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Checking Account #: \_\_\_\_\_ Savings Account # (if applicable): \_\_\_\_\_

Address where the bank statements are being sent: \_\_\_\_\_

Names of current signers on account(s): \_\_\_\_\_

## Steps to be taken when a leadership change occurs:

- All financial accounts have been transferred out of the leader's name who is stepping down and names of current members and leaders are on the account.
- The 4-H Club or Group's previous leadership has submitted all current and past financial documents to the new leader or the county Purdue Extension office for retention.
- The 4-H Club or Group has accounted for all property (including flags, banners, etc.). The club inventory sheet is complete and attached.
- The 4-H Club or Group has shared a calendar of annual events and key contacts. The club calendar and contact sheet is complete and attached.
- Administrative roles for any social media accounts associated with the 4-H Club or group have been transferred to the new leadership.
- All members and volunteers of the 4-H Club or Group have been notified about a change in leadership.

4-H Educator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

This completed document and supporting materials should be kept in the 4-H Club or Group file.

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