

RECORD KEEPING

4-H Program Management Domain

This resource contains general guidelines and best practices for record keeping. All states will have their own rules and procedures. You must check with your state for your best practices and specific operating procedures.

Recordkeeping is the documentation of information and essential facts and evidence for an event, organization, or personal goal. It is a necessary skill for volunteers and youth. Recordkeeping helps to keep track of important information, makes information easily accessible, and aids in organization.

In 4-H clubs, records are used to track expenses and meeting decisions. Records help you be prepared and organized for 4-H meetings or events, track past and future decisions, protect members' health and safety, add nostalgic value, and track progress.

As a volunteer, you can also set an excellent example of recordkeeping by teaching and modeling it to 4-H members. Recordkeeping for youth involves documentation of their progress and learning a critical life skill. It can aid in project record work, scholarship applications, and future college or job applications. Recordkeeping will also be an essential skill that will help young people

keep track of their medical and health history, personal finances, employment records, personal decisions, and more.

What to Keep

Indeed, there is a lot of information that a 4-H volunteer should record; therefore, prioritizing what records are kept is essential. Your record-keeping should include:

- A roster of club members and necessary enrollment information, including contact information, emergency contact information, health forms, photo releases, and more depending on your state's program
- Attendance at each club function
- Financial accounting of 4-H monies
- Minutes and agendas for club meetings
- Plans for upcoming meetings and programs
- Incident/accident reports

Check with your 4-H professional for more details on recordkeeping requirements and retention policies. Records should be regularly shared with your local 4-H professional for long-term retention.

Recordkeeping Tips

Find an organizational pattern that works for you. Consider a file box with folders, electronic files, folders, a three-ring binder, or a specific drawer in a file cabinet.



VOLUNTEER

Research Knowledge Competency

Whatever you choose, ensure you follow your state's guidelines for safely storing any records containing personal information.

- Use templates and forms. Templates streamline the data-collection process and ensure vital information is captured. This is especially helpful for financial reports, minutes, and agendas. If a template does not exist, ask your local 4-H professional or another 4-H volunteer if they can recommend one for you to use.
- Update records regularly.
- Work with your Extension professional to identify a timeline for when records, reports, and forms are due. These could include:
 - Enrollment forms for members or volunteers
 - Registration forms for events, activities, or projects
 - Fair or exhibit entry forms
 - Charter application, renewal forms, or other completion reports

- Club reports (Secretary's or Treasurer's Books, etc.)
- Incident/accident reports
- Ask other volunteers what method they use for record-keeping and the strengths of their system.
- Take time to evaluate if the recordkeeping system is working for you, and if not, try a new method or a combination of methods.

Recordkeeping Self-Assessment

Check yourself on these recordkeeping practices¹:

- I keep my information organized and easily accessible.
- I keep records of 4-H club meetings, finances, and other important information.
- I am a good role model for my 4-H'ers on how to keep their records.
- My records are kept so that I can easily access information needed promptly.



VOLUNTEER

Research Knowledge Competency

Reference

¹Dalager, B., Hoyer, M., Taylor, C., Anderson, M., Erpelding, S., Hardman, L., Gahring, L., Rau, A., Robinette, H., Ledford, H., & Dohlman, H. (2021). *Yearly self-evaluation – 4-H record keeping*. Iowa State University

The original resource 4-H Program Management: Record Keeping (VRKC: Volunteer Research, Knowledge, & Competency Taxonomy) was developed by Sue Pleskac.

VRKC Fact Sheet Series provided by
Program Leaders Working Group: 4-H Volunteerism Committee

Authors (September 2022)

Meggan Franks, Louisiana State University
Sarah H. Kotzian, Ph.D., North Carolina State University
Brenda Prueett, West Virginia University
T. Ashley Burns, Ph.D., Clemson University
Jen Lobley, University of Maine

4-H is the youth development program of our nation's Cooperative Extension System and USDA. The PLWG encourages all Cooperative Extension programs to adhere to their Land-grant University nondiscrimination policy in the development and delivery of Extension efforts designed to engage all people.

