



Funded Partner & Member Agency Required Documentation Checklist

All agencies seeking Funded Partner and Member Agency status with United Way of Bucks County must submit to UW Bucks the required documentation listed below. Documents must be sent in **electronic format** and, where noted, updated on an annual basis.

<input type="checkbox"/>	UW Bucks Funded Partner/Member Agency Agreement: Submit a signed copy of the UW Bucks Funded Partner/Member Agency Agreement signed by the Executive Director or other authorized personnel.	
<input type="checkbox"/>	Provision of Human Services: Submit a brochure and/or a list of the programs being offered by the Agency. Funded Partner and Member Agencies must provide human services that address a verified need or issue and have a visible presence in Bucks County.	
<input type="checkbox"/>	Not-for-profit status: All Funded Partners and Member Agencies must submit their IRS Determination Letter documenting non-profit status, be incorporated, and IRS tax exemption.	
<input type="checkbox"/>	Non-Discrimination Policy: Submit a signed copy of the Non-Discrimination Policy Assurance document. Funded Partners and Member Agencies must comply with United Way of Bucks County's Non-Discrimination policy.	Annual Requirement
<input type="checkbox"/>	Counterterrorism Policy: Submit a signed copy of the attached Counterterrorism Policy Assurance page. Funded Partners and Member Agencies must maintain a counterterrorism policy that meets federal guidelines.	Annual Requirement
<input type="checkbox"/>	Current 990 or Pro Forma 990: Submit a copy of their current 990 or Pro Forma 990. Funded Partner and Member Agencies must demonstrate that they remain in compliance with IRS guidelines.	Annual Requirement
<input type="checkbox"/>	Audit or Independent Financial Review: Submit a copy of an audit or independent financial review. Funded Partner and Member Agencies must practice sound financial and program management and demonstrate the ability to manage their programs and services in accordance with generally accepted accounting principles.	Annual Requirement
<input type="checkbox"/>	Annual Report: Submit a copy of annual report. Funded Partner and Member Agencies must measure the outcomes of the programs they provide appropriately, including reporting on outcomes in an annual report.	Annual Requirement
<input type="checkbox"/>	Mission Statement (if not included in the annual report): Submit the organization's mission statement.	
<input type="checkbox"/>	Annual Budget: Submit copies of an annual budget for the current year. Funded Partners and Member Agencies must demonstrate their ability to meet their financial obligations.	Annual Requirement
<input type="checkbox"/>	Board of Directors List: Submit a current list of Board of Directors. The Board of Directors or governing body should maintain active, rotating volunteers who participate in the policy making processes, strive to represent the diverse elements of the community, recruit new members on a planned basis, and meet at least quarterly.	Annual Requirement