

2017 United Way of Bartholomew County Agency Certification Checklist

1. The following documents should be attached to this Checklist. Please include the most recent copies of all documents.
2. At least one Board member should be involved in the preparation and/or review of the Certification process. This Checklist should then be signed by the Board Chair and the Executive Director.
3. Agencies will be eligible for 1 or 3 year certification. Certification will be determined by the United Way of Bartholomew County Agency Development Committee.
4. Documents must be returned by February 9, 2017 at 4:00 PM to United Way, 1531 13th Street, Suite 1100, Columbus IN 47201 **or** electronically to cstone@uwbarthco.org. If there are any questions contact Cheri Stone at cstone@uwbarthco.org or at 812-375-2203.

- 501(c)(3) Determination Letter (only if a new certified agency)
- 2015 Form 990
- Annual Report
- Latest Strategic Plan – dated
- Board Roster with length of service, email addresses and officers
- Board Meeting Schedule
- Proof of current Risk, Officer and Property insurance (If applicable)
- 2016 Year-end Financial Statements (Profit & Loss and Balance Sheet)
- Most recent Financial Audit or Review (See guidelines in Certified Agency Standards and Policies)
- 2016 Budget Variance Report (\$ and %) (Explain differences over 10%)
- 2-Year Agency Budget (Years 2017 and 2018)
- Completed ratio sheet
- Staff/Leadership Personnel Organizational Chart
- 2016 Year-end outcome results in the RBA form
- Signed Counterterrorism Compliance Form
- Signed and completed Agency Certification Assessment Form
- Signed and completed Conflict of Interest Form (Only one needed from Board Chair stating that all Board members have a signed copy on file.)

(Continued on back)

Please answer the questions below.

1. Explain how your agency' mission fits into one or more of United Way's priority outcomes.

2. Write a brief description on how your agency's strategic plan is used.

3. Explain any pending legal issues, lawsuits, liens or tax issues. (If applicable.)

4. Explain how your agency is making progress on your stipulations. (If applicable.)

Board Chair Signature

Chief Professional Officer/Executive Director Signature

Date

Date