

Agency Name: _____

Completed Agency Information Checklist – Section III

*If most recent fiscal year Audit and 990 are not available, please send copies of most recent copies available. **Do not send applications without Audits and 990s.** As soon as your new Audit and 990 are available, please forward two copies of each to the United Way.

I. Agency Description – Limit your responses to 1-3 paragraphs for this section

- A. Tell us how you describe your agency today.
- B. What processes are in place to assure up to date licensing and inspections as required by law and local ordinances?
- C. What outside service organizations review or evaluate your agency and its programs? Detail their findings.

II. Description of Programs

- A. Provide a 30 word description of each program offered at your agency.

III. Agency Information

- A. Please provide us with each of the following attachments

- 1. A copy of your IRS 501 (c) (3) determination letter
- 2. A copy of the agency non-discrimination policy
- 3. Conflict of interest policy for board members
- 4. An agency wide staff organization chart indicating full-time, part-time, and employee names.
- 5. Current board list and committee structure, showing address and occupation

- 6. A copy of agency's most recent long range strategic plan as well as any updates to the strategic plan

- 7. Agency operating budget (current year)

- 8. Most recent annual report

- B. Please answer each of the following:

NJ Charities Registration Number CH _____ Month/Year of Renewal _____

Year of agency incorporation _____

Agency by laws were reviewed and updated on _____
(insert date above)

Agency personnel policies were reviewed and updated on _____
(insert date above)

IV. Required Ongoing Information Maintenance to Continue Certification

- A. Agency must post and maintain all program information that is offered at each of the agency's site locations on the NJ-211 system.

Updating information of all programs offered at each site location must be completed quarterly on the NJ-211 system to maintain United Way Certification.

- B. Agency must post and maintain all volunteer opportunities available at each of the agency's site locations on Volunteer Solutions.

Updating information of all volunteer opportunities at each site location must be completed quarterly online through Volunteer Solutions to maintain United Way Certification.