

Matrix of 2012-13 Agency Certification Forms and Attachments

You must provide one original and 1 copy of your completed packet

Required Certification Forms and Attachments in the following order	Initial	Description See "Instructions for Completing the Certification Packet"
Matrix Check List		Complete the matrix by initialing all boxes next to each item. Please write N/A if not applicable.
Agency Certification Fact Sheet		This document must be filled out completely and requires the signature of the Executive Director or other certifying official.
Woodland United Way Partnership Agreement		This is the agreement between WUW and certified agency outlining benefits and expectations of the partnership. Requires the signature of the Executive Director or other certifying official.
Attachment A Description of Substantial Local Presence		Description of substantial presence including dedicated address, phone, and hours of operation (must be open for services at least 15 hours per week). Includes detailed description of activities, services provided, and how they affect human health and welfare of the target population.
Attachment B IRS 501(c)(3) Tax-Exempt Letter		Organization's IRS 501(c)(3) Tax-Exempt letter in the name of your organization.
Attachment C Audit/Financial Statements		Audited financial statements or financial statements - see "Instructions" for details. Must cover fiscal year ending June 30, 2010 or later and must be the same fiscal period as IRS Form 990. Requires the signature of the Executive Director or other certifying official.
Attachment D IRS Form 990		Completed IRS Form 990 or, if not required by IRS, a completed Form 990 EZ, with parts I through V-A of Form 990. See "Instructions" for details. Must cover fiscal year ending June 30, 2010 or later and must be the same fiscal period as Audit/Financial Statements. Requires the signature of the Executive Director or other certifying official.
Attachment E 25 Word Statement		A statement, 25 words or less, describing the services your organization provides, for use in campaign materials. Please supply a document that includes all details listed in the "Instructions."
Attachment F Computation of Agency Overhead Expenses		From the IRS 990 form submitted, add part IX, line 25 section C (Management and General) and part IX, line 25, column D (Fundraising), and divide the total computation by Part VII, line 12 Column A (Total Revenue). No other method may be used to calculate this percentage.
Attachment G Board of Directors		Board Roster - Names, terms of office, meeting dates and locations. Please supply a document that includes all details listed in the "Instructions."