

## Northern Berkshire United Way 2009 Annual Agency Review Package Checklist

*Please confirm if this is a “Full” or “Progress” review year for you.*

Packages must be delivered to NBUW, 85 Main St., North Adams  
by 5:00 p.m., February 23, 2009

Please use this checklist to compile all documentation required for your 2009 Agency Review/evaluation for annual funding Allocations from Northern Berkshire United Way and Williamstown Community Chest. **Only items in bold type are required for Progress Reviews. All items are required for Full Reviews.**

### Number of Copies Required

Page #’s	Documents	NBUW	WCC
1	<b>Agency Profile</b>	7	2
2	<b>Agency Cover letter</b>	7	2
3	<b>Agency Self-Evaluation Worksheet</b>	7	2
4	Program Detail (max. 2 pgs. per program) (Optional for Full Review candidates)	3	2
5	Persons Served Data	3	2
6	<b>Budget</b>	3	2
7	<b>3-Year Revenue Plan</b>	3	2
8	Staff/Volunteer Leader/Mgr Resources (see format provided)	3	2
9	Board Member List with Service Dates	3	2
10	Certification for Solicitation	1	2
11	<b>Most Recent Financial Audit</b>	2	2
12	<b>Most Recent Annual Report</b>	2	2
13	<b>IRS Form 990</b>	1	1
	Items 10-13 are from agency, no NBUW/WCC form		

### Appendices/Core Documents

	Include only highlights of changes made to the following docs. during the past 12-15 months. If changes are major, include complete, revised doc. (Only 1 copy each for NBUW & WCC)	Please check-off the status of each document		
		No Sig. Changes Since Your File Copy	Changes-- Highlights Included	Big Changes --Fresh Doc. Included
A	Mission Statement			
B	Strategic Plan			
C	By-laws, Non-discrimination policy, Personnel Policies			
D	Anti-terrorism Certification			