

United Way of Greater Kansas City
Small Grant Funded Agency Certification Checklist



Date March 22, 2011

Agency _____

Small Grant Funded Criteria:

- Have nonprofit, 501(c)3 status
- Deliver health or human services
- Have a volunteer board of directors with at least five (5) members and meets four (4) times a year
- Prepare an annual line item operating budget and periodic financial statements
- Annually file a Form 990
- Have an annual budget of not more than \$500,000
- Obtain an annual audit of the organization's financial statements (or a review for organizations under \$250,000 in revenue)
- Complete the annual certification process for small grant organizations

The following required documents are being submitted as part of the certification process:

Document Description	Submitted	
Board Approved Agency Budget	?	
IRS Form 990 or 990EZ as filed (signed)	?	
Periodic Financial Statements	?	
How frequently are they prepared?	?	
If other, please specify. _____		
Audit or review for most recently completed fiscal year	?	Please Select
Management Letter	?	
Response to management letter (if applicable)	?	
Board of Directors Roster	?	
Term of service listed for each Board Member and affiliation	?	
Officers Identified	?	
Annual Report	?	
501(c)(3) determination letter (current)	?	
Current Agency Name	?	
Current Address	?	

I attest that the agency is in compliance with the above criteria.

Signature of CEO: _____ **Date:** _____

Signature of Board Chair: _____ **Date:** _____