

United Way of Buffalo & Erie County

General Campaign – Donor Choice Program

NEW AGENCY INFORMATION FORM



AGENCY NAME

The legal name of the organization is the primary name by which your organization is listed in IRS records

About us: The [United Way](#) campaigns for the Health, Education, and Financial Stability of every person in Buffalo and Erie County. We surround our community’s most critical problems that threaten the future of individuals and communities – limited access to health services, lack of education, and financial instability. We conduct research and report our findings through our [Community Report Cards](#). Based off our research, we press for the building blocks of life and help fund programs that create change, by investing in the areas of most need in our community. United with our partners, including through direct, *unrestricted contributions*, and engagement opportunities to be a part of the solution, we offer hope and help where it is needed the most, strengthen communities, and fight to build a better tomorrow – today.

- [Education](#): Kids be all they can be by developing a strong foundation for life – young children and students are equipped to succeed in school and reach their full potential
- [Health & Wellness](#): Build strong and healthy communities – people access the care and knowledge they need to improve their health and be well
- [Financial Well-Being \(Income\)](#): Families achieve financial independence – promote self-sufficiency by improving knowledge and skills to achieve long-term stability

Please read the following carefully to complete this form

The United Way of Buffalo & Erie County offers the Donor Choice Program through our General Campaign as a courtesy to allow our donors to choose another charitable Health and Human Service* agency to receive their contribution. The United Way does not advertise, endorse, sponsor, or solicit designations for other nonprofit agencies selected by donors (i.e. “Donor Choice”). For your organization to be registered and possibly eligible to receive donor designations, you must meet the following criteria (see also page 5).

1. Agency must currently be a tax-exempt charitable (not-for-profit) organization under section **501(c)(3)** of the Internal Revenue Code, *and* provide a direct **public Health and Human Service*** (see last page).
2. Complete (*type*) this **FILLABLE PDF** sign, date, and return by **ONE (1)** of the means listed below.
3. Include copy of the **IRS Department of Treasury 501(c)(3)** determination *or* affirmation letter with this form. This letter specifies that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. *Note: This is NOT a certificate declaring that you are exempt from state sales tax on purchases.*

See this helpful IRS website link for more information on charities & non-profits: <https://www.irs.gov/charities-non-profits>

Send to the attention of the Pledge Services Manager by ONE (1) of the following means:

- Email** signed document to customerservice@uwbec.org or a specified individual
- Fax** to (716) 887-2770
- Mail** to the address below

United Way of Buffalo & Erie County
 742 Delaware Avenue
 Buffalo, NY 14209-2202

Main phone: (716) 887-2626

FOR UNITED WAY USE ONLY			
Received			
501(c)(3)		HHS	
Eligible			
Scope			
NTEE Code (NCC#)			
Federation			
Account#		Book#	

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I. AGENCY IDENTIFICATION

A) **Federal Tax ID Number** (9-digit EIN / TIN):

(Used when filing annual Form 990 Return or 990-N)

Are you **affiliated with another charity?** *(Using an EIN from a separate agent, fiduciary, or supporting organization)* **NO** – provide YOUR agency's EIN, Legal Name, etc. below
 YES – show that agency's EIN and Legal Name, and YOUR org's name under "Other Name"

B) **LEGAL Name:**

OTHER Name [ONLY IF DIFFERENT - dba, AKA, abbreviation, or acronym]

C) **STREET** (Physical) Address:

MAILING / Donation Address:

If different

COUNTY (Erie, Niagara, etc.):

D) **Phone:**

Fax:

Website:

General Email *(for donation info; that will NOT change):*

E) **Agency's Main Contact** Person & Title:

Phone number:

Email:

II. LEADERSHIP AND GOVERNANCE

Are you an **all-volunteer** org?

F) Chief **Executive Officer** (CEO, President, etc.) Name & Title:

Phone Number:

Email:

G) Chief **Volunteer Officer** (Board of Directors) Name & Title (***required***):

Phone Number:

Email:

Chief Volunteer Officer's **Work/Business** Name & Address:

(Helps avoid creating duplicate individual accounts in our database)

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III. Charitable Status IRS 501(c)(3) Determination or Affirmation Letter

EIN recorded on Agency Identification on Page 2 should match the 501(c)(3) IRS determination letter

- The IRS has determined that our organization (or group) meets the requirements for 501(c)(3) tax-exempt status. ***Our*** 501(c)(3) determination or affirmation letter is attached.
- Our 501(c)(3) tax-exempt status is granted through an ***affiliate organization***. A copy of that organization's IRS 501(c)(3) determination or affirmation letter is attached.
- Other:

Provide Details (if applicable)

The IRS Exempt Organizations Select Check website may help determine your eligibility to receive tax-deductible contributions. Organizations are generally required to file an annual **990-Series Return or Notice (e-Postcard)**. **Date 990 last filed or exception:**

Provide Details / Explanation (example: reason for filing exemption)

IV. Agency Mission and Supporting Program Name Information

What is the **Mission Statement** of your agency? Enter a **brief** description/statement of purpose. *Does this statement identify a **health and human service*** component?*

If applicable, list ongoing **PROGRAM NAME(S)** that are a **recognized, main part of your agency** (we may attach additional "program accounts" to your lead organization).

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V. National Taxonomy of Exempt Entities (NTEE) Classification System

The NTEE system is used by the IRS and NCCS (National Center for Charitable Statistics) to classify nonprofit organizations <https://nccs.urban.org/> These may not all provide a health & human service.

Please select the (one) group below that is assigned to your charity. NTEE Core Code:

- Animal Related (D)** – Animal Protection & Welfare, Wildlife Preservation & Protection, Veterinary Services, Zoos & Aquariums
- Arts, Culture, & Humanities (A)** – Arts & Culture, Media & Communications, Visual Arts, Museums, Performing Arts, Humanities, Historical Organizations, Arts Services
- Civil Rights, Social Action, & Advocacy (R)** – Civil Rights & Liberties; Intergroup & Race Relations
- Community Improvement & Capacity Building (S)** – Community/Neighborhood & Economic Development; Nonprofit Management; Community Service Clubs
- Crime & Legal Related (I)** – Crime Prevention; Correctional Facilities; Offender Rehabilitation Services; Administration of Justice; Law Enforcement; Protection Against Abuse (Spouse/Child/Sexual); Legal Services
- Education (B)** – *Schools*: Preschool, Primary, Elementary, Secondary, High, Charter; *Special Education*; Vocational/Technical Schools; *Higher Education* - Colleges/Universities; Graduate/Professional Schools; *Adult Education*; Libraries; Student Services - Scholarships/Financial Aid; *Educational Services*
- Employment (J)** – Preparation/Procurement (counseling/training); Vocational Rehabilitation
- Environment (C)** – Pollution Abatement & Control; Natural Resources Conservation & Protection
- Food, Agriculture, & Nutrition (K)** – Agricultural Programs; Food Programs (food banks, etc.); Nutrition
- Health Care (E)** – Hospitals; Health Care: Ambulatory/Primary, Reproductive; Rehabilitative Care; Health Support; Public Health; Health (General & Financing); Nursing (Facilities, Home Health Care)
- Housing & Shelter (L)** – Housing Development, Construction, & Management; Search Assistance; Temporary; Homeowners & Tenants Associations; Support
- Human Services (P)** – Human Service Organizations; Children & Youth Services; Family Services; Personal Social Services; Emergency Assistance; Residential Care & Adult Day Programs; Centers Supporting Independence of Specific Populations
- International, Foreign Affairs, & National Security (Q)** – including Understanding; Development, etc.
- Medical Research (H) and Voluntary Health Associations & Medical Disciplines (G)** – Diseases: Birth Defects & Genetic (downs syndrome); Cancer; Specific Organs; Nerve, Muscle, & Bone; Allergy-Related; Digestive Disorders; Specific Named (AIDS, Alzheimer's, Autism); Medical Disciplines
- Mental Health & Crisis Intervention (F)** – Substance Abuse Dependency, Prevention & Treatment; Mental Health Treatment; Hot Lines & Crisis Intervention (sexual assault services); Addictive Disorders; Counseling; Mental Health Disorders; Mental Health Associations
- Philanthropy, Voluntarism, & Grant-making Foundations (T)** – Private Grant-making Foundations; Public Foundations; Philanthropy, Charity, & Voluntarism Promotion; Federated Giving Programs; Trusts
- Public & Societal Benefit (W)** – Military & Veterans' Organizations; Leadership Development; Consumer Protection
- Public Safety, Disaster Preparedness, & Relief (M)** – Services; Safety Education; Public Safety Benevolent Associations
- Recreation & Sports (N)** – Camps; Physical Fitness & Community Recreation; Sports Associations & Training Facilities; Recreational Clubs; Amateur Sports/Competitions (Special Olympics)
- Religion Related (X)** – Christianity, Judaism, Islam, Buddhism, Hinduism, Religious Media & Communications, Interfaith Coalitions
- Science & Technology (U)** – General Science, Physical & Earth Sciences, Engineering & Technology, Biological & Life Sciences
- Social Science(s) (V)** – Including Interdisciplinary Research (Black, Women, Ethnic, Urban, Int'l, Aging, Labor)
- Youth Development (O)** – Youth Centers & Clubs; Adult & Child Matching Programs (BBBS); Scouting; Youth Development Programs

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VI. Charitable Status and Anti-Terrorism Compliance Certification

- By checking this box, I hereby certify on behalf of the organization named on this document, that all information provided is correct and true, any funds through the United Way are used for **charitable purposes only**, AND
- ✓ we are **currently** eligible to receive tax-deductible charitable contributions under **Section 501(c)(3)** of the Internal Revenue Code, and in **good standing** with all **IRS and State regulators**.
 - ✓ we provide direct public **Health and Human Services*** as a significant part of our Charitable Mission.
 - ✓ we are in compliance with the **USA PATRIOT Act** (Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism) and other counterterrorism laws, and that all United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders.

Print Signatory Name and Title _____

Signature of Chief Executive Officer or Chief Volunteer Officer

Date

* **What are Health and Human Services?**

Health and Human Service agencies work to improve and maintain the health and well-being of individuals by providing for necessities such as: food, water, clothing, shelter, safety, and healthcare, psychological/social interpersonal needs [acceptance, dignity], and self-actualization/self-fulfillment [achieving one's full potential and prosperity]. This is achieved by developing, promoting, encouraging, and adopting continued improvements in the areas of medicine, public health, social support services, and other disciplines.