U.S. Fish and Wildlife Service  
Annual Friends Tasks/Documentation Checklist  

Orient Friends Board  
Annually orient the Friends Board of Directors on the Department of the Interior, U.S. Fish and Wildlife Service, program, and site’s mission, goals, objectives, scope of operations, and the many programs that play a role at the site/program, such as visitor services, biology, law enforcement, maintenance, etc.  

663 FW 1.5 F (4)  

Date of Board orientation:  

Review and Update Agreements  
Annually meet with the Friends Board of Directors to review and assess the effectiveness of the partnership as it relates to the purpose, goals, objectives, roles, and responsibilities outlined in the Friends Partnership Agreement to ensure expectations are clear and realistic, and to ensure it describes how Friends activities support the site (or sites) or program. This includes performing annual reviews as described in Exhibit 1  

663 FW 1.5 F (5) and Friends Partnership Agreement IV.A.  

Date of Annual Meeting:  

Modify the agreement if there are any significant changes to the scope of the partnership. The meeting should also assess compliance with Service policies and procedures, discuss effectiveness of internal controls, and evaluate accountability for revenues, donations and expenditures  
Friends Partnership Agreement V.A.(6)  

Did the station and the Friends agree to a modification to the agreement? Yes/No  

Ensure that the Friends have a current and valid Friends Partnership Agreement and, as applicable, Fundraising Agreement in place, which clearly identifies and describes fundraising activities the Friends will conduct to carry out their mission to support the Service site or program prior to any fundraising taking place. Some fundraising activities may require a separate Fundraising Agreement when certain dollar thresholds are anticipated;  

633 FW 1.5 F (14)  

When does the Friends Partnership Agreement expire?  

Is a fundraising agreement needed? Yes/No  

Ensure that the Volunteer Services Agreements are properly completed and signed for each Friends member who will be acting as a Service volunteer, and that they accurately describe the work and duties that will be performed at or in support of the Service site/program. Review and update Volunteer Services Agreements annually.  
Friends Partnership Agreement V.B.(6)  

Has the station updated Volunteer Service Agreements? Yes/No  

July 15,2021
**Reporting**

Project Leaders are responsible for reporting back to the Friends group on an annual basis regarding funds deposited into the CFA to ensure accountability for all parties;

*633 FW 1.5 F (15)*

*Friends Partnership Agreement IV.B. (9)*

Did the station deposit any funds from Friends into a Contributed Funds Account? Yes/No

If so, did the station report on the how the funds were spent to the Friends group? Yes/No

Date of report:

Annually verifying that the Friends maintain an active tax-exempt status under Section 501(c)(3) of the Internal Revenue Code;

*633 FW 1.5 F (16)*

At least once annually during the period of performance, the Friends must provide evidence of nonprofit, tax-exempt status as an attachment to this agreement and or a copy of the letter from the IRS confirming an application has been filed.

*Friends Partnership Agreement IV.A.*

Did the Friends provide a copy of their most recent 990, 990 EZ, 990F filing? Yes/No

Requesting and reviewing the Friends’ annual report, which must include, at a minimum, annual total expenditures and revenues and the current number of members (if applicable); As part of annual reporting, providing requested data about the Friends organization to the Regional or National Friends Coordinator, or both;

*633 FW 1.5 F (17)*

*Friends Partnership Agreement IV.B. (9)*

*Friends Partnership Agreement IV.C. (11)*

Did the station ensure annual reporting was complete? Yes/No