

People United Foundation — Procurement Checklist (v1.0.0)

Move from interest → approval → invoice/PO → launch.

1) Select the purchase path

- Enterprise & Sponsors landing
- Sponsored cohorts (launch toolkit)
- Invoice/PO request
- Partner packet

2) Confirm procurement requirements

- PO / invoice / ACH / check
- Vendor onboarding (if required)
- Any compliance requirements

3) Scope the purchase

- Program(s): Workforce / Leadership / Governance / Community
- Purchase type: Enterprise / Cohort / Seats / Bundles
- Quantity + desired start date

4) Documentation (available upon request)

- Procurement packet + RFP boilerplate
- Impact reporting framework (aggregate-only)
- W-9 (upon request)

5) Launch readiness

- Confirm kickoff date
- Send participant welcome email (template in cohort toolkit)
- Set sponsor update cadence (aggregate)

Privacy note: PUF does not require participant accounts (v1) and does not conduct surveillance or individual tracking. Reporting is aggregate and community-level, with no personal profiling.