

People United Foundation — Vendor Onboarding Checklist (Procurement)

Requested Documents (from PUF)

- W-9 (upon request)
- Proof of EIN / IRS letter (if required)
- Invoice remit-to details
- Program scope and pricing
- Insurance certificates (only if required)

Buyer Information to Provide

- Legal organization name
- Billing address
- Primary contact
- Procurement contact (if different)
- PO required? (yes/no)
- Payment method (ACH / check / card)
- Net terms (e.g., Net 30)

Purchase Details

- Program(s): Workforce / Leadership / Governance / Community
- Option: Sponsored cohort / enterprise license / train-the-trainer / workshop
- Quantity: seats or cohort size
- Preferred timeline / start date
- Reporting needs (aggregate only)

Privacy note: No accounts required. No surveillance or individual tracking. Reporting is aggregate and community-level.