

## Application for Fiscal Sponsorship Guidelines

### A. Our Mission:

We support and sponsor projects that build community equity. We highly value projects that will contribute to communities, the economy and environment. We support project organizers in planning and managing their projects, in researching funding sources, and writing proposals for grants. When specifically approved by our Board of Directors, we provide fiscal sponsorship to these projects. Fiscal sponsorship allows project organizers to receive grants or donations (cash and noncash) that require a 501(c) 3 nonprofit. When received, we provide this money to the project organizers for use in their projects. We do not contribute money to projects from our operating funds. This application will begin the review and approval process for fiscal sponsorship. In order to fund our services, we will charge an administrative fee based on a percentage of the grants or donations you receive. We describe this administrative fee in our agreement.

### B. How to Apply: (Please follow these guidelines carefully. We will notice your attention to detail.)

1. First, read this entire document thoroughly. If you follow this guide carefully, your chance of gaining fiscal sponsorship will increase significantly. Then review the criteria listed in Section C to assess whether or not your project is an appropriate candidate for fiscal sponsorship. Answer yes or no to each criteria. If you have a no, you will want to adjust your project before you apply. There is no need to give your assessment to us, but make sure your project meets the criteria before you apply.

2. Address the application sections listed in Section D. Please use these sections as the framework for your application. First, carefully examine all of the questions in each section. Then, briefly answer only those questions in each section that appear relevant and necessary to clearly explain the project for which you are requesting fiscal sponsorship. Your application should be as short as you can make it and still address all of the relevant questions in each application section (we strongly suggest that you provide a crisp application on one page, and we will accept only two pages, maximum). You will have time to elaborate if needed in your meeting with us as described in item B.5. Be sure to include a page number and your organization's name on all the pages of your application.

3. We offer a workshop on how to complete this application twice each year. However, we will consider applications received outside of our training process.

4. Submit one copy of your completed application to Greg Johnson at:  
[greg@gregcjohnson.com](mailto:greg@gregcjohnson.com).

5. If we have not discussed your application prior to your submission, after we review your application we will contact you to talk informally about your project. We will answer any questions you may have, and learn more from you about your project. If necessary, we will ask you to re-address some sections in the application. After this discussion, and once your application is complete, our Board of Directors will meet to consider your application. This review and decision process usually takes no more than one to three weeks to complete.

6. Should our Board accept your project for fiscal sponsorship, we will ask you to sign a simple one page Fiscal Sponsorship Agreement with our organization. In our first discussions, we will give you a copy of the agreement for your review and explain it to you.

C. Criteria: (This is how we will evaluate your application for fiscal sponsorship.)

1. The project must be aligned with our mission as described in the first two sentences in Section A.
2. The project organizers must be willing to work in collaboration and harmony with our Center.
3. The project is planned consistent with the time lines of the grant funding being requested.
4. As a fiscal sponsor, we are ultimately responsible to the grantor for the grant funds, and to the IRS for our activities. As a result, we will look carefully at the project with the following questions in mind:
  - a. Alignment—does the project contribute to and support our mission as described above?
  - b. Context—will this project address real needs in the community?
  - c. Content—how valuable is the project likely to be for the community?
  - d. Clarity—is the project clear and understandable?
  - e. Feasibility—will the project work? Are the time-lines realistic? Are the financials realistic?
  - f. Commitment—are the project organizers fully committed to the project?
  - g. Capacity—do the project organizers and volunteers have a demonstrated capacity to succeed in this project?
  - h. Compensation—if the project includes compensation for the organizers, does the community service benefit outweigh any concerns about the dollar value of the compensation budget?

D. Application Sections:

1. Organization: What is the name of your organization (or project)? How and when did it start? What is your mission? Who is involved in your organization? List groups, individuals, paid staff, if any, and volunteers. Show the role of the individuals involved, and a very brief summary of their backgrounds, experience, and affiliations in the community. How is your organization connected to the community? If there are more than several people involved, what is your organization structure? Describe significant accomplishments of the organization, and any success with related projects that the individuals involved in this project may have. How do the capacities of the individuals involved in the project support the successful completion of your mission or project?

2. Problem Statement or Needs Assessment: What problem or need does this project address? Who will benefit from this project? How will this project benefit the community? How will it help bring the community more closely together?

3. Objectives (Outcomes): What is (or are) the objective(s) of the project for which money is needed? What will your project accomplish? Make sure this objective is linked to your problem statement above.

4. Methods: How will you accomplish your project? What activities or action steps will be needed?

What are the time-lines of these activities? (Provide a schedule of major action steps with approximate start and completion dates for each.) How do the time-lines fit with the funding requirements?

5. Evaluation: How will you evaluate your project? How will you determine if you are successful?

6. Funding: How much money do you need to accomplish your project? How are you planning

to fund your project? Show your proposed sources of funding (grants, fundraising in the community, earned income [selling goods or services], and in-kind donations). Identify any funds already secured or pending. Is there a need for long-term funding?

7. Budget: What are the costs and expenses for the project? Show your estimates by category of expense.

8. Administrative:

a. Depending on your organizational structure, do you have an EIN, or are you willing to use your own SSN to open your project's bank account? Do you have a separate bank account for your project in which to receive, spend, and account for funds for this project? If not, before we can give you money you will need to verify the account with us by providing a copy of your bank statement or a voided check showing the name of project in the header.

b. What is the most difficult obstacle for the completion of your project? How do you intend to overcome it?

c. If you have been working with one or more funders (foundation, government source, nonprofit organization, business, or major donor) to fund your project, please describe the status of your funding arrangements.

d. Are you planning to apply for an IRS tax exemption as a 501(c)3? If so, what is your schedule?

9. Applicants: On the last page of the application, list the names, addresses, and telephone numbers of each applicant for this project, date the application, and at least one applicant must sign the application. *We cannot accept unsigned applications.*