

Fiscal Sponsorship

Completing the Project
Information Form



Ashley Walden
VP of Community Impact
awalden@cfozarks.org

Completed your project?

- If your group has completed the project supported by a fiscal sponsorship fund with the CFO, please contact Ashley Walden.
- If your project is complete, you do not need to attend a session or complete the forms. Instead, we will work with you to close your project's fund.

Deadlines

- **August 31:** Use online payment/disbursement form and process
- **September 30:** Complete Project Information Form
- **December 31:** Submit online form for ALL special events and any new activities for your project. New activities include anything that is not in your project information form that has been submitted.

Current Project Information Form

- Access the Project Information Form [HERE](#)
- **TIP:** The online form does not save your work. Because of this, for your convenience, we can provide you a hard copy, in a Word document, so you can complete longer answers in the Word document to make sure answers are saved. Then when you are ready to complete the form and upload documents, you can copy and paste answers from the Word document into the online form.

Current Project Information Form

- **Support for the changes and transition:** We require that project leaders attend **one** Fiscal Sponsorship Information Session. During these sessions we will walk through the Fund information, how to complete required forms and any anticipated future changes. Contact Ashley Walden to setup your appointment, once the account is setup.

Current Project Information Form

- Resources to help you complete this information form:
 - CFO/Darr Family Foundation [grant training modules](#) can help you with many areas of the application.
 - [Project budget template](#) for the application.
- Information Form FAQs...

FAQ - Project Leaders

- We recommend **two** project leaders for each project. As a current project if you do not have two project leaders, that is okay. You can still complete the form.

FAQ - Project Details

- **Project/Fund Name:**
 - Please enter the name of the fund at the CFO
- **Action Items for the Project: Please provide a list of current and/or proposed activities that your Project will engage in to meet this community's needs in the next 12 months. Please be specific, realistic and as thorough as possible.**
 - This is primarily for any actions outside of fundraising. Fundraising is addressed in another section.
- **What region(s), area(s) or town(s) are served by this project? Where do activities take place?**
 - You can list a counties, cities, description of the region, etc.

FAQ - Project Details

- **Types of Projects:**

- Choose the one that best describes your CURRENT plans.

- **Select the category that best describes the charitable focus of the project.**

- You can only choose one area. Please choose the primary area.

- **What region(s), area(s) or town(s) are served by this project? Where do activities take place?**

- You can list a counties, cities, description of the region, etc.

FAQ - Mission Alignment

- **Please read the statements in their entirety before answering the question. Your project must align with the CFO mission.**
 - Choose the one that best describes your CURRENT plans.

FAQ – Collaboration & Partnerships

- **If you are not collaborating with any other partners, please note that in the response boxes.**
- **CFO can help you connect with other organizations and groups doing similar or complimentary work.**

FAQ – Funding & Fundraising

- **We will have more questions about any government funding to complete our due diligence and meet audit and IRS requirements.**

FAQ – Additional Project Details

- **Independent contractors:** To comply with IRS and CFO policies, that are procedures to follow.
- **Intellectual Property:** This is the property of the project and not CFO. However, we want to make sure you have the resources you need to make informed decisions.
- **Staff:** We do not allow projects to employ any staff. If you are a project that is on the path to obtaining your 501c3 and will be adding staff, we do have resources to support you with that.

FAQ – Financial Details

- **[Project Budget Template](#)**: Click the link to access the template. Please use the [grant training modules](#), specifically the "Developing a budget" module from session 4.
- **Budget Narrative Justification**: This is not required, but it is a good place to elaborate on anything that cannot be explained well in the budget template spreadsheet.

Questions?

Please provide your questions and feedback at any time!

Ashley Walden, VP of Community Impact,
awalden@cfozarks.org or 417-864-6199 ext 3543



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