

Fiscal Sponsorship Information Session



**Ashley Walden,
VP of Community Impact
awalden@cfozarks.org**

Why are we here today?

- Purpose of [fiscal sponsorship programs](#)
- [Fiscal sponsorship Info packet](#)
- Types of fiscal sponsorship programs
- How a fiscal sponsorship fulfills part of the CFO's mission
- Discuss current and upcoming changes to the fiscal sponsorship program
- Receive feedback, learn, listen and answer questions

Agenda

- Overview of the fiscal sponsorship program
 - Where we've been
 - Where we are
 - Where we are going
 - Anticipated outcomes from the changes
- Review the current changes for fiscal sponsorship projects
 - Online information form
 - Online payment/disbursement form

Where we've been...

- GROWTH...SO MUCH GROWTH in this area
- Researched best practices for fiscal sponsorship programs (and continue to research and learn)
- Reviewed current system to bring a new fiscal sponsorship project aboard with the CFO.
- Compared best practices to the CFO practices and put a plan in place to fill the gaps we've learned we have.
- Adjusted staffing to better support the fiscal sponsorship projects and leaders through this transition.

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.

Coming Soon!

- Fiscal sponsorship handbook (including applicable CFO policies and procedures) in 2026
- Project reporting/follow-up and support resources in 2026
- Updated fund documents in 2026
- Fiscal sponsorship program fee review: updated fees for Fiscal Sponsorships go into effect FY27 at 3%.

How does this impact our current fiscal sponsorship projects & their leaders?

- Change and transition
- **Additional Support:**
 - Monthly information sessions and orientations
 - Contact Ashley with questions and we will problem-solve and work through question and issues together!

Current project leader action items

- [Payment/disbursement form](#) & process
 - Required documentation
 - Using this form for payment/disbursement requests is required
- [Project Information Form](#)
 - Please complete form by September 30 each year.
 - Use the [grant training modules](#) on the CFO website and reach out with any questions to Ashley. Here is the link to the [project budget template](#) for the application.

Additional Information

- **As of January 1, 2024:** The CFO will begin requiring the online event form being completed 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.

Questions?

Please provide your questions and feedback at any time!

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



COMMUNITY
FOUNDATION
of the OZARKS
