

## Community Foundation of the Ozarks

### Fiscal Sponsorship Application Overview

*“The mission of the CFO is to enhance the quality of life for our citizens now and for future generations by building community endowments, meeting needs through grantmaking, providing leadership and promoting collaboration on community issues.”*

Thank you for considering the Community Foundation of the Ozarks for fiscal sponsorship of your project. Our fiscal sponsorship program provides opportunities for your charitable projects to enhance life in communities in central and southern Missouri.

As a steward of these charitable, taxpayer and other funds, the CFO adheres to high standards of integrity for the resources entrusted to it for the public benefit

The process to apply for fiscal sponsorship is outlined below. Please reach out with questions at any time.

1. **Review the CFO’s Fiscal Sponsorship website:** Please review the fiscal sponsorship info packet and [webpage](#) carefully. If you are not eligible or may not remain eligible, the CFO can connect you with another local fiscal sponsor, Network for Strong Communities (NSC). NSC has the ability to support projects with the application for and management of government funding. While we want to be part of the great work you are doing, we do not want to hold you back!
2. **Project Eligibility:** Review the eligibility criteria to make sure your project qualifies.

**A fiscally sponsored project and its activities must:**

- Be led by an advisory committee with a majority of those committee members being non-family members
- Follow the CFO’s policies and procedures and fiscal sponsorship general guidelines.
- Follow fundraising guidelines from the CFO, IRS and any federal, state and local laws and regulations that may affect these activities
- Fall within the CFO’s current insurance coverage, as determined by the CFO’s insurance broker, or be able to pay for additional insurance coverage
- Notify the CFO at least 60 days prior to applying for grants (excluding grants from CFO affiliates)

**A fiscally sponsored project and its activities must not/may not:**

- Receive or request government funding, including grants or contracts (See “Other options for Fiscal Sponsorship” on page 2 of [CFO Fiscal Sponsorship Handout](#))
- Provide a duplication of community services
- Attempt to influence legislation as a substantial part of its activities
- Participate in any campaign activity for or against political candidates
- Be organized or operated for the benefit of private interests
- Inure to the benefit of any private shareholder or individual (in regard to the project’s donations)
- Present unacceptable levels of liability for the CFO

- Provide any childcare/daycare services where volunteers are responsible for the care of another person
  - Build, renovate or repair any residential or commercial housing facilities
3. **Application Process:** Once you have reviewed the fiscal sponsorship webpage and are confident you meet the eligibility requirement and the CFO is a good fit for your project, you can [begin your application](#). While we ask that you complete the application online, we have run into some issues with technology and recommend that you write and save your answers in a separate document before copying and pasting them into the online application.

**Additional resources:**

[Detailed information about how to complete the application](#)

[Budget worksheet for the application](#)

4. **Review Process & Timeline:** Applications will be reviewed the month after they are received by a committee of CFO staff from various departments. Applicants are notified of the committee's decision by the end of the month in which they meet.

Example: An application received on November 25 will be reviewed by the committee in December. Project leaders will be notified of the committee's decision by the end of December.

The notification may include additional questions, committee recommendations, etc. that need to be addressed by the project prior to final approval.

5. **Onboarding and Orientation:** Once a project is approved for fiscal sponsorship and a new fund has been established, project leaders are asked to transfer the minimum required amount of \$2,500 to the fund. Once this occurs, project leaders are required to attend an orientation before any disbursements may be made. Important information is covered in these orientations that will keep your project in compliance with the CFO's policies and procedures.

We offer monthly orientations for new project leaders, those interested in applying for fiscal sponsorship and projects leaders who may need a refresher. We encourage project leaders to reach out to the CFO if there is any support we can provide. We want to see your project be successful!

Thank you,

Holly Beadle

Director of Philanthropic Services

[hbeadle@cfozarks.org](mailto:hbeadle@cfozarks.org)

417-864-6199

**Community Foundation of the Ozarks**

**Fiscal Sponsorship Project Information Form**

**Project Leaders**

**Two project leaders are required.**

**Project Leader 1**

- Name:
- Mailing Address:
- City:
- State:
- Zip:
- Email:
- Phone:
- Date of birth:

**Project Leader 2**

- Name:
- Mailing Address:
- City:
- State:
- Zip:
- Email:
- Phone:
- Date of birth:

### Project Details

1. Project Name - The name of the project is attached to every form within your process. This is the "identifier" for the request. Character Limit: 100
2. One Sentence Description: Describe your request in one (brief) sentence. If selected, this sentence will be used by CFO communication staff to share information about your project. Character Limit: 250
3. Is your need for fiscal sponsorship time sensitive? If so, please explain.
4. Date the project was established.
5. Current status of your project at this time:
  - Planning stage
  - Ready to launch
  - Currently active
  - Temporarily Dormant
6. What region(s), area(s) or town(s) will be served by this project? Where will activities take place?
7. Select the category that best describes the charitable focus of the project:
  - Animals
  - Arts
  - Community Development
  - Education
  - Environment
  - Faith
  - Health
  - History
  - Library
  - Social Services
  - Youth
8. Will your project involve work with any of the following groups? Check all that apply.
  - Animals
  - People with disabilities
  - Senior Citizens over the age of 65
  - Youth under 18
  - I will not be working with any of these groups
9. Will your project be involved in international affairs?
  - Yes
  - No
10. Will any of the following be part of your project? Check all that apply.
  - A physical office or program location
  - Equestrian activities
  - Food preparation

- In-person gatherings/events
- Professional services requiring certification/licenses
- Use of tools, machinery, or recreational equipment
- Water sports or activities
- None of the above

11. Charitable Purpose of the Project: What is the charitable mission and purpose of your project? (Please tell us what problem/challenge your Project seeks to solve. Please also tell us what the expected positive influences of your project will be, including how many people will benefit because of your work or any other benefit to the community?)

Character Limit: 3000

12. Goals and Action Items of the Project: How does your project seek to solve the challenge/problem? 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. Character Limit: 3000

13. How long do you expect the project to last?

14. Types of Projects: Choose the type of project that best described your projects situation:

- Incubated:** Charity entrepreneurs with an unproven idea for a program can test whether the project is feasible and warrants the effort to form a new nonprofit. Fiscal sponsorships with incubated projects may last only for the short term, depending on its complexity and difficulties in setting up and obtaining exemption for a new standalone nonprofit.
- Perpetual:** Project leaders may never intend to set up their own nonprofit, preferring instead to continue operating indefinitely under their fiscal sponsor. This can be beneficial when the sponsor takes the onus of administrative services, which lets project leaders focus on their programmatic and/or philanthropic work.
- One-time Event:** A one-time, short-term project may not merit the time and effort of setting up a new charity, obtaining tax-exempt status, and later dissolving it. In this case, fiscal sponsorship provides an efficient solution.
- Quick Launch:** Fiscal sponsorship can offer a useful stopgap when project leaders need to launch their program immediately and do not have time to form and qualify a new nonprofit.

15. Does your project have an advisory committee?

16. Check the following that currently apply:

- This project has applied for or received nonprofit status from the state of Missouri.
- This project has received 501c3 status or other tax-exempt status from the IRS (Internal Revenue Service).
  - Note tax-exempt designation is other than 501c3
- This project has applied for 501c3 status with the state of Missouri and/or IRS but has not been approved yet.
- This project plans to apply for nonprofit 501c3 status with the state and IRS in the future.

- This project does not plan to apply for nonprofit status.
17. Has your group incorporated with the State of Missouri as any type of legal entity responsible for its own actions? (i.e., LLC, 501c4, etc.)?
- Yes. Please list type:
- No
18. Is your project currently being fiscally sponsored by another organization?
- Yes
- No
19. If project is already sponsored by another organization, list the name of organization serving as current fiscal sponsor and reason for applying to the CFO to become new fiscal sponsor.
20. What type of fiscal sponsorship are you looking for?
- Model A (the project and committee are not part of an existing legal entity)
- Model C (the project is part of an existing legal entity)
21. Do you have general liability insurance?
22. Does your project plan to award grants or funding to other organizations?
- Yes. Describe groups you plan to award funding to.
- No

### **Mission Alignment**

When evaluating a potential partner, the CFO will consider the items in this application, including mission alignment. We encourage potential partners to evaluate the CFO as well. All projects fiscally sponsored by the CFO must be aligned with the CFO's vision, mission, and commitment to inclusive excellence.

**CFO Mission & Vision:** The mission of the Community Foundation of the Ozarks is to enhance the quality of life in our region through resource development, community grantmaking, collaboration, and public leadership.

**CFO's commitment to Inclusive Excellence:** The CFO will not discriminate on the basis of race, color, sex, religion, national origin, age, ability, sexual orientation, gender identity or veteran status. As part of the fiscal sponsorship process, all applicants will be required to affirm that, in providing services sponsored in whole or in part by a CFO grant, the project will not discriminate on the basis of race, color, sex, religion, national origin, age, ability, sexual orientation, gender identity or veteran status either in its employment practices or in its policies and procedures concerning access to services.

As part of the fiscal sponsorship process, all applicants will be required to affirm that, in providing services sponsored in whole or in part by a CFO grant, the project will not discriminate on the basis of race, color, sex, religion, national origin, age, ability, sexual orientation, gender identity or veteran status either in its employment practices or in its policies and procedures concerning access to services.

23. Does your project and activities align with the mission and vision of the CFO?

- Yes
- No

### **Project Promotion**

24. Is there currently a website or plans for a website for the Project?

- Yes. If yes, list website for project:
- No

25. Are there currently social media accounts or plans for social media accounts for this project?

- Yes. If yes, please list links to all social media accounts for the project.
- No

### **Collaboration & Partnerships**

26. Collaborating Organizations - Please list names of the organizations that are part of your action plans. Character Limit: 1000

27. Current and Future Partnerships Between Agencies - Please describe the current and future partnerships that are part of action plans. Describe the current relationship with each proposed partner and the potential future relationship that would develop via this potential partnership. Character Limit: 3000

28. Collaborating Organization Contact Information - Please provide a contact name, phone, and email for the primary contact at each collaborating organization listed above. Character Limit: 2000

29. Roles of Each Partner - Describe the roles each partner will play in carrying out the proposed project. Please note each partner must have a meaningful role in the effort. Character Limit: 3000

### **Funding & Fundraising**

30. PROJECT FUNDING PLANS: Fund Development strategy - Where do you expect the funding to come from? (Please check all that apply) \*

- Individual donations

- Fundraising community events (Project leadership must provide insurance for the event, name the CFO as an insured and provide a certificate of insurance to the CFO at least 60 days prior to the event. Please see fiscal sponsorship project handbook for more information.)
  - Foundation grants or funding
  - Governmental grants or funding
  - Corporate support
  - Fee for Service. Please describe
  - Sale of merchandise/goods. Please describe
  - Membership Dues
    - If yes, how much are dues?
    - If yes, do members receive any benefits with the dues?
    - If yes, describe the benefits (meals, tickets, etc.)
  - Other. Please describe:
31. Do you currently have or expect to apply for any type of government funding (city, county, state, federal)?
- Yes. If yes, please describe
  - No
32. Do you currently have commitments for any funding
- Yes. If yes, please describe
  - No
33. Funding Plan - Please provide a list of current and/or proposed fund development activities that your Project will engage in to fund activities. Please be specific, realistic and as thorough as possible. Character Limit: 3000
34. Is there any intangible property (i.e., intellectual property such as trademarks, copyright in works created contact lists, etc.).
- Yes. Describe type of property, how it is used in the project and if it will be transferred from any other legal entity, if applicable)
  - No

### **Additional Project Questions**

35. Does your Project currently or plan to work with independent contractors?
- Yes. Please describe
  - No
36. Do you currently have or intend to develop any significant intellectual property
- Yes. Please describe
  - No
37. Do you currently employ staff for this project?
- Yes



- No
38. Do you have volunteers now or do you intend to have volunteers in the future outside of the advisory committee?
- Yes. List number of volunteers and general description of their roles/duties.
- No
39. Please note anything else you would like to tell us about your Project that you feel we should know or understand? \*

### **Financial Details**

40. Please complete a budget for your proposed program using the Budget Template spreadsheet (click here to download, and then select 'enable editing' to edit and save the document as your own).  
Download the template, complete it to the best of your group's ability, and upload the completed spreadsheet. [This template is in Excel format](#). Contact Millie Schuchmann at [mschuchamnn@cfozarks.org](mailto:mschuchamnn@cfozarks.org) if you have questions about the spreadsheet. If you have a budget prepared in a different format you may upload that.
41. **Budget Narrative Justification: Please provide further budget details not on the excel spreadsheet.** Examples include rationale for a specific budget cost, details on expenses outlined in the budget spreadsheet, and any details which are not self-explanatory about the budget. \*Not Required\* Character Limit: 3000
42. **Estimated initial deposit to establish fund, if new project/fund: \$**

### **Documentation Uploads**

- A. Event or service insurance documentation, if applicable.
- B. Please attach advisory/steering committee roster that includes the names, email addresses, phone number, employer and role in the committee for each member of the advisory/steering committee.
- C. Please attach the most recent minutes of steering/advisory committee
- D. Resume(s) for project leaders
- E. Budget Template
- F. Additional Relevant Uploads: Please upload any document (or combined PDF of documents) you find relevant to your request which helps clarify any aspect of your proposal. File Size Limit: 10 MB
- G. New projects/funds: Letters of Support - Optional letters of support from each partner agency within your proposed collective impact project may be uploaded as **one** file here.