

Dear Fiscal Sponsorship Project Leaders,

The CFO has experienced growth in many areas, including fiscal sponsorship projects, throughout the region and needs to make updates to this program.

- We need a better way to work with communities and their unique projects.
- We want your project to be successful – now and into the future! If your project evolves and obtains its own 501(c)3, we want you to have best practices in place and access to resources that help them determine what those best practices are for your project and situation.
- Fiscal sponsorship projects operate under the CFO's 501(c)3 status. The CFO is subject to reporting and filing requirements that make it necessary to obtain more information about fiscal sponsorship projects.

We need a structure in place to accomplish these goals and give everyone the best chance for success! The form below is a big part of this. Each fiscal sponsorship project is unique to the need and community it serves. This allows communities to develop projects that truly meet their needs and determine the best way to meet those needs. This application is designed to provide the CFO committee with the information needed to determine any further needs for the project and connect your project with potential resources and support. The CFO will only accept submissions through the online form. A PDF has been provided since the online form does not allow you to save your work. We encourage you to copy and paste the contents of the PDF form into a word processing document and complete your longer answers there.

Once the information form is submitted and reviewed, CFO staff will be in touch with additional questions and/or requests for more documentation to provide a complete review of each unique project. Please contact me with any questions. The forms submitted will be reviewed by the end of the month, and staff will ask questions. Thank you for completing this form.

Thank you,

Rachel Tripp  
Community Impact Manager  
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417-864-6199

Ashley Walden  
Vice President of Community Impact  
awalden@cfozarks.org  
417-864-6199

## The CFO Fiscal Sponsorship Project Information Form

### Project Leaders

#### **Project Leader 1**

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

#### **Project Leader 2**

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

### Project Details

**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

**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

**What region(s), area(s) or town(s) will be served by this project:** Where will activities take place?

**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

**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

**Goals of the Project:** How does your project seek to solve the challenge/problem? \* Character Limit: 2000

**Action Items for the Project:** Please provide a list of current and/or proposed activities and timelines that your project will engage in to meet this community's needs. Please be specific, realistic and as thorough as possible. \* Character Limit: 3000

**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.

**Check the following that currently apply:**

- This project has 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).
- 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 status with the state and IRS in the future.
- This project does not plan to apply for nonprofit status.

**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.

**Does your project and activities align with the mission and vision of the CFO? Yes or No**

**Project Promotion**

**Is there currently a website or plans for a website for the Project? Yes or no**

**List website for Project:**

**Are there currently social media accounts or plans for social media accounts for this project?** Yes or no

**Please include links to current social media account(s) for the project:**

### **Collaboration & Partnerships**

**Is your project currently being fiscally sponsored by another organization?** Yes or no.

**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.**

**Is your project currently incorporated as any type of legal entity?** Y/N.

If yes, please describe:

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

**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

**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

**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**

**PROJECT FUNDING PLANS: Do you currently have funding for your Project? \*** Y/N

**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 sponsorships
- Web page donation page
- Other:
- If Other was selected, please describe:

**ACTION ITEMS FOR FUND DEVELOPMENT:** 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

**Do you currently have commitments for any funding?** \* Yes or no. If yes, please describe\*

**Do you currently have or expect to apply for any type of government funding (city, county, state, federal)?** \* Yes or no. If yes, please describe\*

### Additional Project Questions

**Does your Project currently or plan to work with independent contractors?** \* Yes or no. If yes, please describe\*

**Do you currently have or intend to develop any significant intellectual property?** \* Yes or no. If yes, please describe\*

**Is there anything else you would like to tell us about your Project that you feel we should know or understand?** \*

**Do you currently employ staff for this project?** Yes or no.

**Do you plan to employee staff for this project?** Yes or no.

### Financial Details

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 agency's ability, and upload the completed spreadsheet. This template is in Excel format. Contact Rachel Tripp at [rtripp@cfozarks.org](mailto:rtripp@cfozarks.org) if you have questions about the spreadsheet.
- **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

**Estimated initial deposit to establish fund, if new project/fund: \$**

### Documentation Uploads

- **Event or service insurance documentation:** if applicable.
- 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.

- Please attach the most recent minutes of steering/advisory committee
- Resume(s) for project leaders
- **Budget Template**
- **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
- **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.