Fiscal Sponsorship

Completing the Project

Information Form
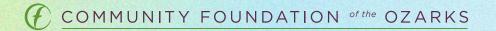
July 2024

Current Project Information Form

- Access the Project Information Form [HERE](#)
- **TIP:** The online form does not save your work. Because of this we advise you to download the [PDF version of the information form](#). Copy the contents of the PDF and paste it into a Word document and 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 of the four** opportunities for Fiscal Sponsorship Information Sessions held on Zoom during August and September. Please *click here to register* for one of . You will receive the Zoom link after you have registered. During these sessions we will walk through how to complete the forms at the links above, the current changes, and future changes. We will host additional info sessions monthly beyond September.

- **August 8 - 12:30-1:30pm**

- **August 22 - 12:30-1:30pm**

- **September 12 - 12:30-1:30pm**

- **September 26 - 12:30-1:30pm**

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:**
  - o 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.**
  - o 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?**
  - o You can list a counties, cities, description of the region, etc.

FAQ - Project Details

- **Types of Projects:**
  - o Choose the one that best describes your CURRENT plans.
- **Select the category that best describes the charitable focus of the project.**
  - o 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?**
  - o 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 conduct 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 employee 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 is a good place to elaborate on anything that cannot be explained well in the budget template spreadsheet.

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Questions?

Please provide your questions and feedback at any time!

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