

# Fiscal Sponsorship Information Session

2024



**Holly Beadle, Director of  
Philanthropic Services**

**Millie Schuchmann,  
Manager of Philanthropic  
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# 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.

# Where we are...

- Ready to provide training on NEW payment/disbursement process with a pilot group of fiscal sponsorship projects
- Gather information on current fiscal sponsorship projects and open fiscal sponsorship funds.
- Ready to receive feedback to refine new processes, forms, etc.
- Potential fiscal sponsorship project must apply to become a sponsored project in the future.
- Ready to review and evaluate applications and sponsor new projects

We will cover this today with our CURRENT fiscal sponsorship projects!

These are for FUTURE/NEW fiscal sponsorship projects!

# Where we are going...

*Coming Soon!*

- Insurance process (primarily for project activities & events)
- Updated fund documents
- Fiscal sponsorship handbook (including applicable CFO policies and procedures)
- Project reporting/follow-up and support resources
- Fiscal sponsorship program fee review: The review will take place in FY25 with no increases in this fiscal year.

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

- Change and transition
- **Additional Support:**
  - Information sessions and orientations
    - 2x/month now-Oct, then monthly
  - Contact Holly 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
  - Please begin using this form for payment/disbursement requests by July 31.
- [Project Information Form](#)
  - Please complete form by August 15
  - Use the [grant training modules](#) on th CFO website and rease reach out with any questions to Holly. Here is the link to the [project budget template](#) for the application.

# Questions?

Please provide your questions and feedback at any time!

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