

Fiscal Sponsorship Information Session

2024



**Holly Beadle, Director of
Philanthropic Services**

**Millie Schuchmann,
Manager of Philanthropic
Services**

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 Millie.
- 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 2025
- Project reporting/follow-up and support resources in 2025
- Updated fund documents in 2025
- 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:**
 - Monthly information sessions and orientations
 - 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 August 31
- [Project Information Form](#)
 - Please complete form by September 30.
 - Use the [grant training modules](#) on the CFO website and reach out with any questions to Holly. Here is the link to the [project budget template](#) for the application.

2024 deadlines

- **August 31:** Use online payment/disbursement form and process
- **September 30:** Complete Project Information Form
- **January 1:** 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!

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